SMART

STATEWIDE MANAGEMENT, ACCOUNTING AND REPORTING TOOL

Participant Guide – PO320: Processing Purchase Requisitions

State of Kansas

As of March 9, 2010 **Final**

TABLE OF CONTENTS

Course Overview

Course Objectives

Upon completion of the course, you will be able to:

- Define basic purchase requisition terms
- Explain how purchase requisitions fit in the end to end processes for Purchasing
- Create and edit purchase requisitions within the SMART system
- Use item selection methods and special requests
- Manage purchase requisitions

Agenda

Today, we will cover the following topics:

- Purchase Requisition Key Terms
- Purchase Requisitions within the Purchasing Process
- Browsing Catalogs
- Advanced Search Options
- Creating a Purchase Requisition Using an Item from the Item Master List and a Procurement Card
- Creating a Purchase Requisition without an Item From The Item Master List
- Creating a Purchase Requisition for a Fixed Asset Item
- Creating a Purchase Requisition for a Project Item
- Creating a Purchase Requisition with Prior Authorization Approval
- Editing, Saving and Submitting Purchase Requisitions

Participant Notes:

- Purchase Requisition Statuses
- Managing Purchase Requisitions
- Favorite Items
- Personal Templates
- Special Requests For Goods
- Special Requests For Services

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Lesson 1: Understanding Purchase Requisitions

Objectives

Upon completion of this lesson, you will be able to:

- Define basic purchase requisition terms
- Explain how purchase requisitions fit in to the end-to-end processes for Purchasing
- List the roles involved in the purchase requisition process and describe the tasks performed by each role

Key Terms

- **Purchase requisition** – Record of a request for items
- **Sourcing** – The process of creating purchase orders from requisitions
- **Purchase order** – Commitments from an organization to vendors to purchase goods or services from that vendor on a specific date; creates an encumbrance in SMART
- **Budget checking** – The process of comparing expenditure or revenue transactions against a defined budget
- **Items** – A good or service purchased by the State of Kansas
- **Item Catalog** – A collection of item categories
- **Item Category** – A grouping of items

Participant Notes:

- **Favorite items –** Frequently used items or transactions that are maintained in a single location
- **Speed Charts** – Pre-defined ChartField combinations that can be defined with a single accounting distribution or with multiple accounting distributions. Speedcharts are identified and invoiced with Speedchart code during data entry to increase efficiency by reducing the number of keystrokes for frequently used accounting distributions
- **Account Codes –** The ChartField that categorizes the nature of a transaction as a specific type of revenue, expense, asset or liability
- **Schedule** –The schedule defines when and where you want the line items delivered
- **Vendors** – A vendor is any person or a company from which the State of Kansas purchases goods or services, including state agencies, sub recipients, and sub-grantees
- **Buyer –** An individual that updates and approves Purchase Orders within SMART
- **Requester** – An individual who requests goods or services to be entered into SMART by the Requisitioner, and whose ID appears on the various procurement pages that reference Purchase Orders
- **Requisitioner –** The individual that enters the purchase requisition into SMART. This may be the same individual as the Requester.
- **Templates –**Templates provide a way to group items that are often ordered together. Personal templates enable you to quickly create requisitions in SMART for frequently ordered items.

Participant Notes:

- **eProcurement** – A SMART module that provides the ability to enter requisitions either from an online catalog from which a Requisitioner can search for goods and services from various suppliers, or enables a Requisitioner to be able to add a free-form (special request) item (if the item is not found in an online catalog)

Topic 1: Purchase Requisition Key Concepts

- **Requisition elements**: Requisitions consist of four basic elements: headers, lines, schedules, and distributions. Each requisition has one header, which can have multiple lines. Each line can have multiple schedules, and each schedule can have multiple distributions. The schedule defines when and where you want the line items delivered. The distribution defines internal information for the schedule, such as the way in which accounts and departments should be charged for the purchase and the total price each department should pay.

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

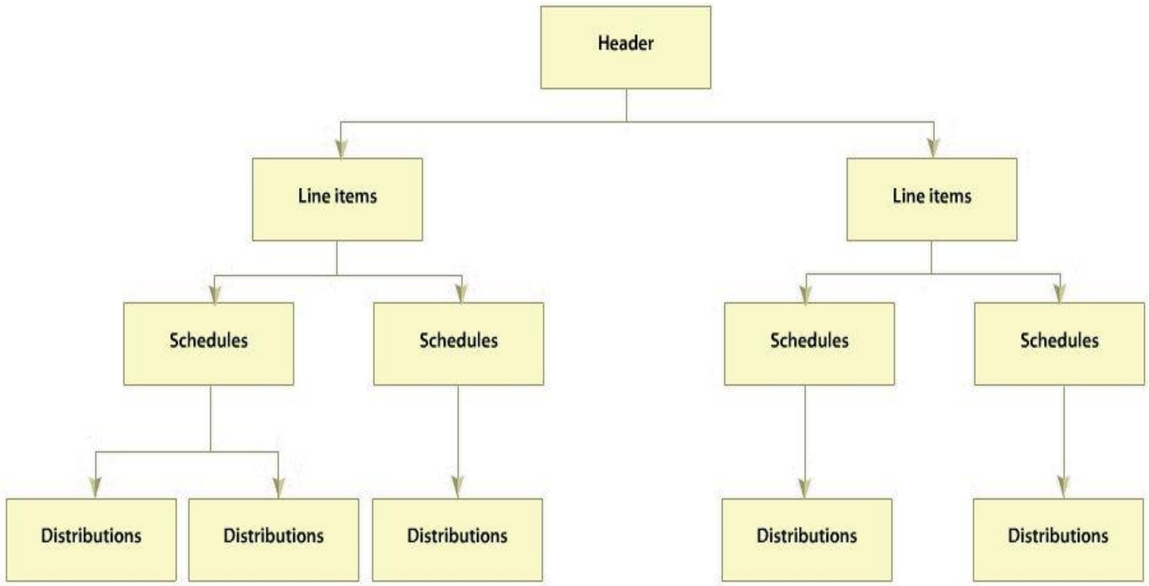


Figure 1. Requisition Elements

Topic 2: Purchase Requisitions within the Purchasing Process

The following roles are involved in the Purchase Requisition Process:

SMART User Role	Key Activities per Role – Processing Purchase Requisitions
Agency Requisitioner	Creates requisitions
Kansas Buyer	Updates purchase orders, dispatches purchase orders
Agency Contract Processor	Creates contracts, sets up collaborations, performs contract maintenance
Kansas RFx Processor (KDOT)	Initiates sourcing events, performs RFx maintenance, recommends awarding of events
Agency Requisition	Maintains agency requisitions, closes out unused

Participant Notes:

SMART User Role	Key Activities per Role – Processing Purchase Requisitions
Administrator	requisitions
Kansas Super Buyer (KDOT)	Creates purchase orders, creates purchase orders from events
Agency Buying Administrator	Maintains agency purchase orders and closes out unfilled purchase orders
Central Purchasing Administrator	Maintains the setup tables related to Purchasing, excluding the Items Table Master
All Approver roles	• Agency Purchasing Approver • Kansas Ad-Hoc Approver • Kansas Ad-Hoc Requester Approval roles associated with purchase requisitions

Table 1. SMART User Role Definitions

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

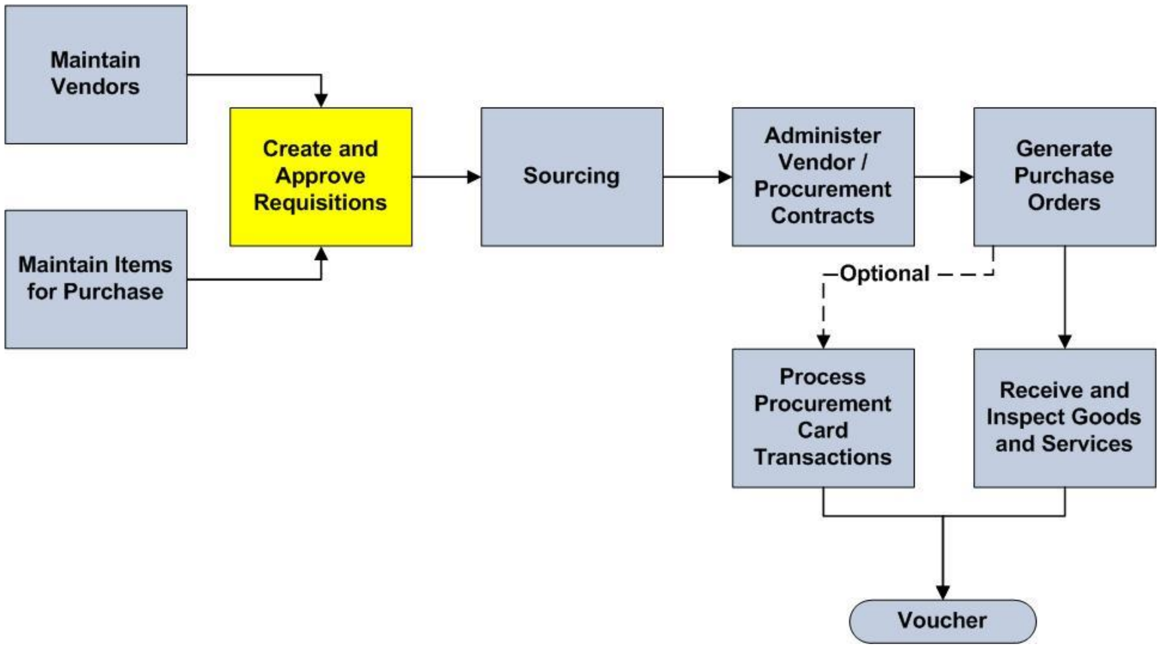


Figure 2. End-to-End Purchasing Process

- Managing requisitions involves creating requisitions, budget checking the requisitions, approving the requisitions, and selecting a vendor. After you dispatch, receive, process, and reconcile the purchase order, requisitions are closed via an automatically generated batch process in SMART.

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

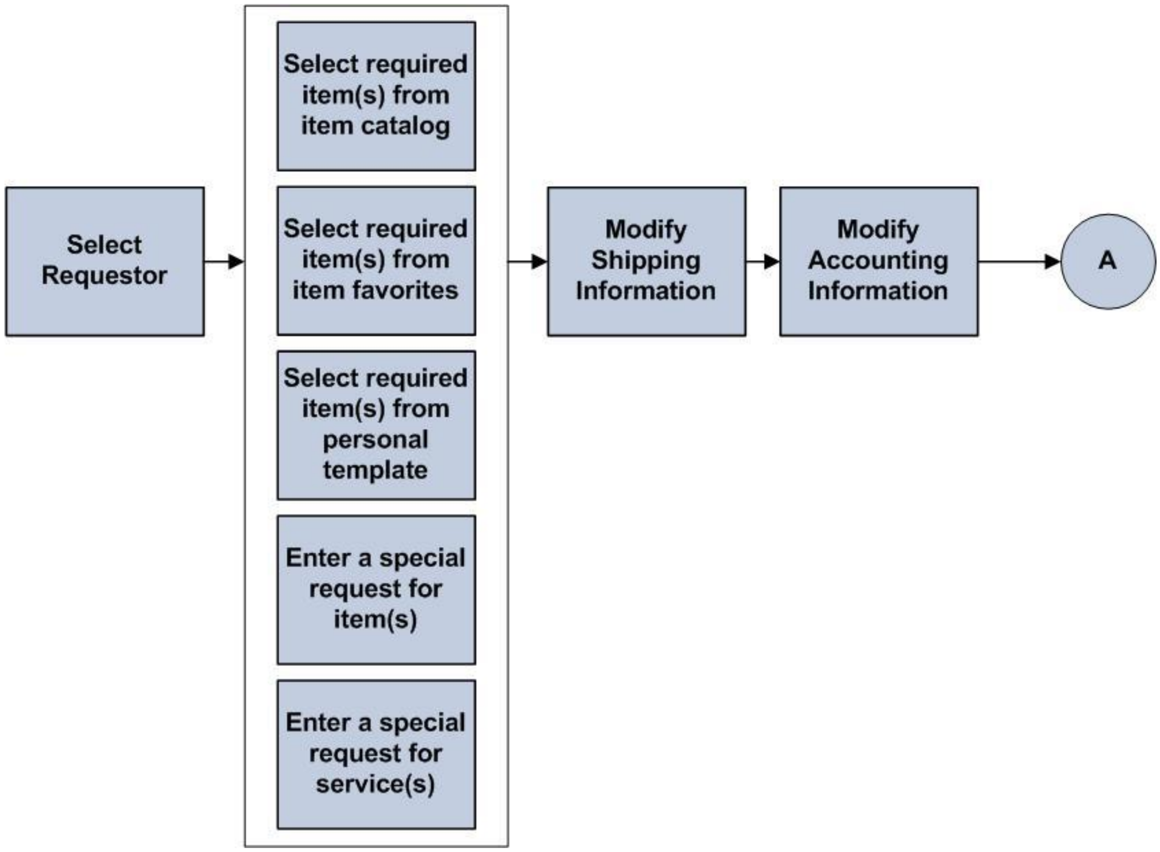


Figure 3. Creating a Requisition Process Part 1

Participant Notes:

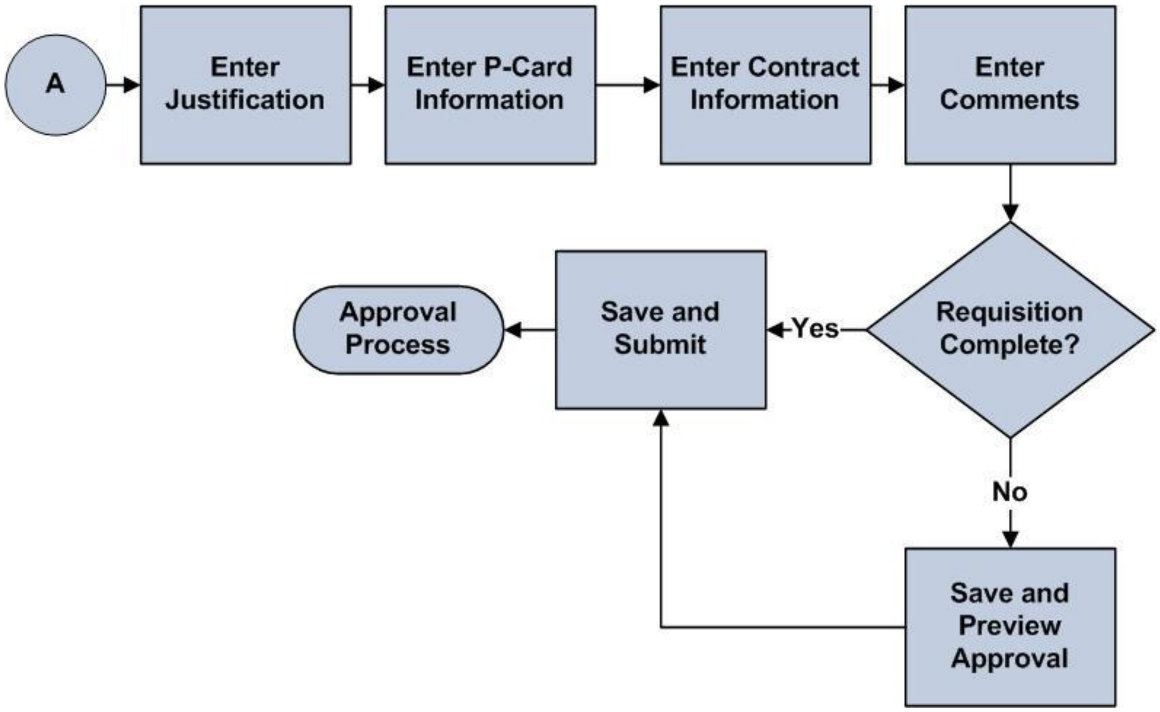


Figure 4. Creating a Requisition Process Part 2

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

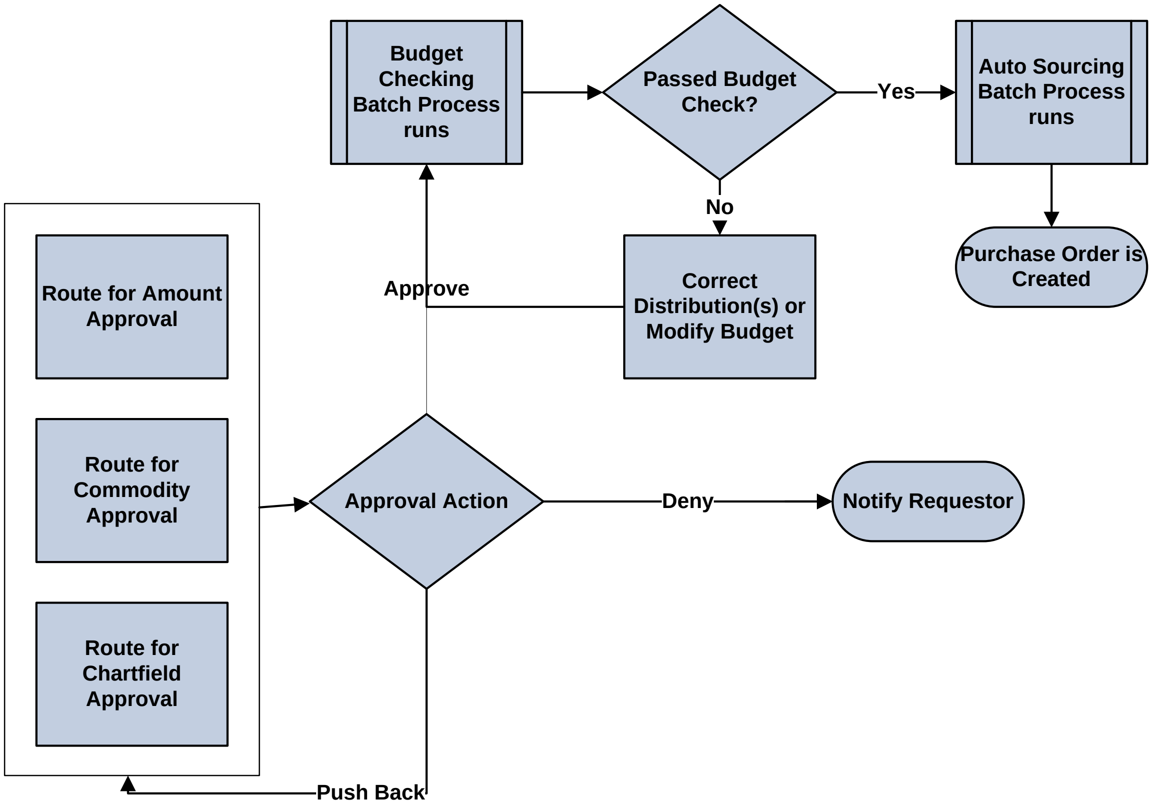


Figure 5. Processing a Requisition Process

Lesson Review

In this lesson, you learned:

- The key terms associated with purchase requisitions in SMART
- The business processes of purchase requisitions within SMART
- The roles and tasks that interact with purchase requisitions within SMART

Participant Notes:

Additional Resources

The following are additional resources that provide more detail about the topic we have covered:

- SMART Website – Purchasing – eProcurement materials
- State of Kansas Division of Purchases website - http://www.da.ks.gov/purch/

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Lesson 2: Performing Item Searches

Prologue: Lesson 2 is designed to teach you how the Item Master List and Item Catalogs are structured within SMART. Once you understand how items are structured and stored in SMART, you then learn several search methods used to locate items. From Lesson 2, you continue to Lesson 3 where you learn how to create and modify purchase requisitions in SMART.

Objectives

Upon completion of this lesson, you will be able to:

- Browse catalogs within SMART
- Perform keyword, advanced and compare searches within SMART

Key Terms

- **Item Master List**: Detailed list of items maintained in SMART by the State of Kansas

  Note It is important to know that in July 2010, the SMART Item Master Catalog list will contain ONLY statewide contract items. The Item Master Catalog List is maintained by Central Division of Purchases.

Participant Notes:

Topic 1: Browsing Item Catalogs

- **Item Catalogs**: Item catalogs are a collection of specific State of Kansas statewide contract items in SMART.
- **Item Categories**: Item categories provide transaction information for requisitions, requests for quotes, contracts, and purchase orders.

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

2. Add Items and Services Page

Use this page to request an item or service

Page Name	Navigation
Add Items and Services	eProcurement > Create Requisition > 2. Add Items and Services

Figure 6. Add Items and Services Page_Catalog Tab

Participant Notes:

Fields	Description
Search	Use this field to enter the item you wish to search for
Select a Catalog	Use this drop-down box to select the catalog you wish to browse. Navigate categories by clicking folders. View items in a category by clicking the category name. Use the checkboxes to select categories to search.
Description	Use this field to search based on a description of the item
Manufacturer	Use this field to search based on the company that makes/sells the item
Manufacturer's Item	Use this field to enter the identification number/name of the item classified by the Mfg. (Can be different than the Vendor Item ID)
Vendor	Use this field to enter the name of Vendor
Vendor Item ID	Use this field to enter the ID name/number of the item classified by the vendor. (Can be different from the mfg. id)
Item ID	Use this field to search based on Item ID
UPN ID	Use this field to search based on UPN ID
Images Checkbox	Use this field to include images in the catalog search

Table 2. Add Items and Services Page_Catalog Tab Fields

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Catalog Search Results Page

The Catalog search results page displays the results of your item search. You can then select the item(s) to requisition. This search will pull every item in the catalog that matches the key word/value(s) that were entered into the search field(s).

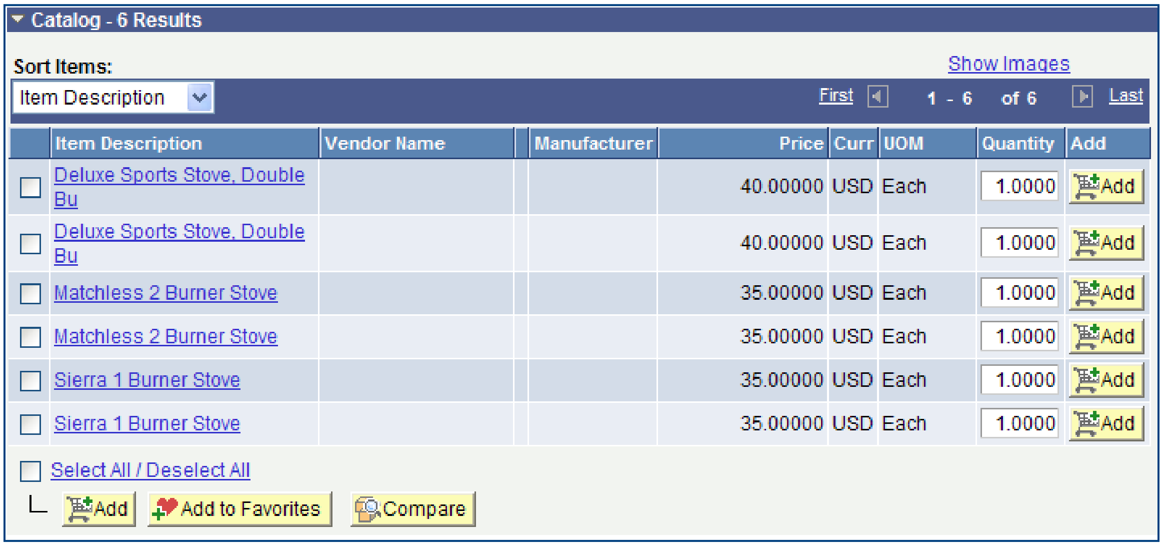


Figure 7. Add Items and Services_Catalog Search Results

Fields	Description
Quantity	Use the **Quantity** field to specify the number of items you want to order. By default, a value of one is specified in the **Quantity** field.
Select Item Checkbox	Use this field to select the item(s) you wish to use
Add Buttons	Use this button (in conjunction with the Select item checkbox/es) to add the item(s) to the requisition

Table 3. Add Items and Services_Catalog Search Results Page Elements

Participant Notes:

Walkthrough/Activity

We will now complete Activity1: Browsing Item Catalogs in your Activity Guide.

Walkthrough/Activity

We will now complete Activity 2: Item Keyword Search in your Activity Guide.

Topic 2: Advanced Search Options for Items

Basic Search Page
When you use the search field, rather than using the catalog look-up, the results display on a separate tab.

Search Settings Page
Use the Search Settings page to define the number of rows of results that you want to display per page.

Page Name	Navigation
Create Requisitions Search Settings	eProcurement > Create Requisition > 2. Add Items and Services > Search Settings Link

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

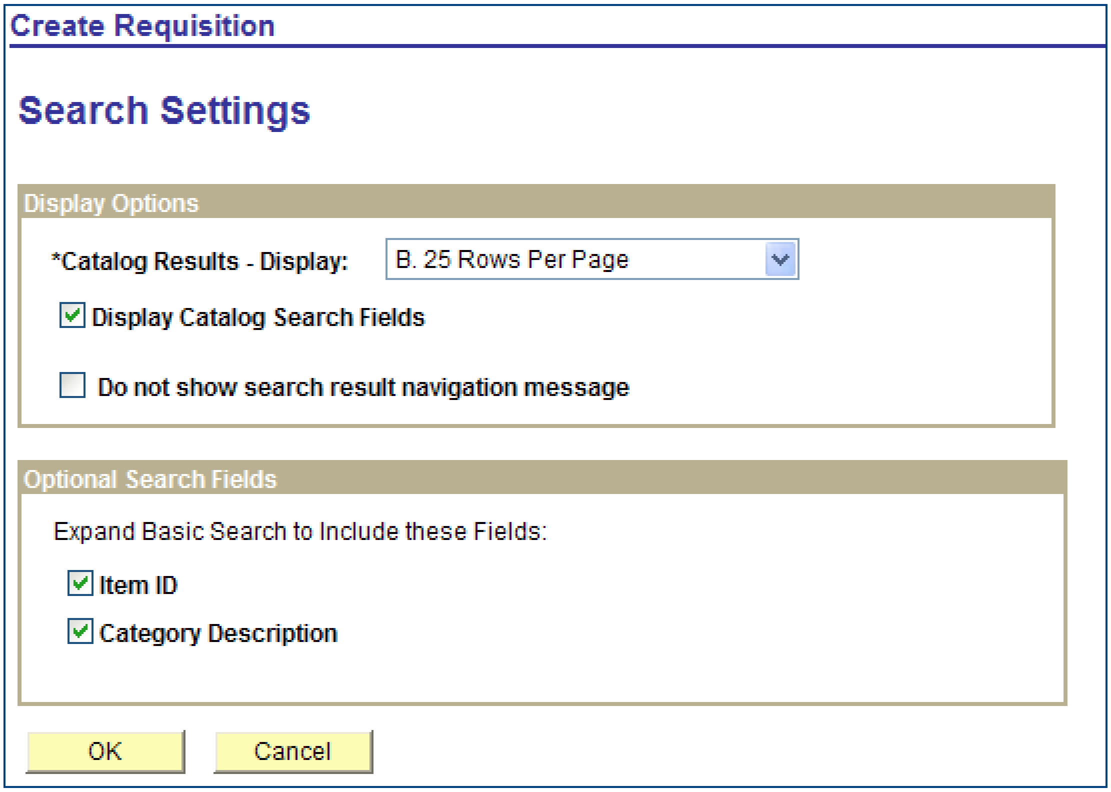


Figure 8. Create Requisitions Search Settings Page

Fields	Description
Catalog Results – Display	Use this field to determine how many catalog rows per page you wish to view. You can view 15-100 rows at a time.
Display Catalog Search Fields	Use this checkbox to display or not display catalog search fields
Do not show search result navigation message	Use this checkbox to show or not show search result navigation

Participant Notes:

Fields	Description
Item ID	Select this checkbox to include (or deselect to not include) the Item ID in the search results
Category Description	Use this checkbox to include (or deselect to not include) a category description in the search results

Table 4. Create Requisitions Search Page Elements

Advance Search – Search Catalog

Searching with field data in the Search Catalog section allows you to further define or refine your search. Using additional search criteria may help to narrow the search for specific item(s). **Note**: The Search Catalog function is spelling and grammar specific.

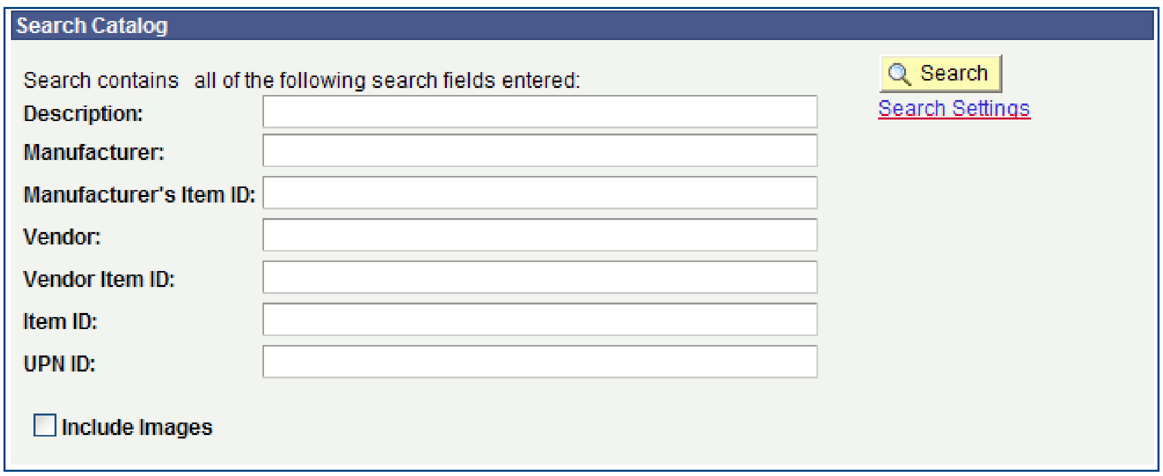


Figure 9. Add Items and Services - Search Catalog

Walkthrough/Activity

We will now complete Activity 3: Item Advanced Search in your Activity Guide.

Participant Notes:

Compare Button - Comparison Searching

When searching for an item to requisition, you have the ability to compare up to five items side by side. Use the item selection checkboxes to select the desired items, and then click the Compare button on the Search Results page to display the comparison:

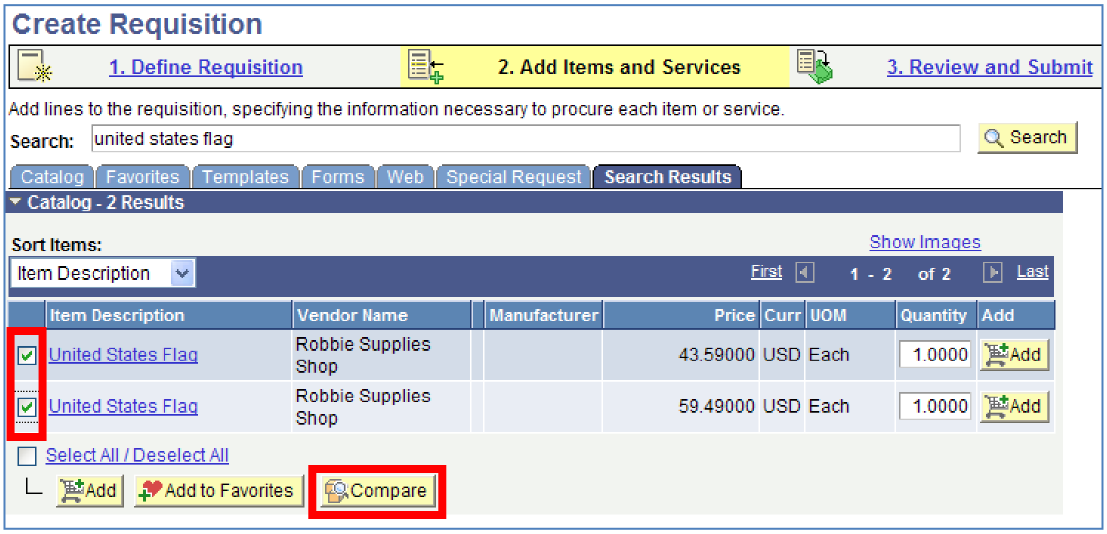


Figure 10. Search Results page for items

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Figure 11. Side by Side Comparison for 2 Items Expanded

Walkthrough/Activity

We will now complete Activity 4: Side by Side Comparison for Items in your Activity Guide.

Lesson Review

In this lesson, you learned:

- How to browse item catalogs in SMART
- How to perform keyword searches, advanced searches and compare searches for items within SMART

Participant Notes:

Walkthrough/Activity

We will now complete Activity 5: Item Keyword Search in your Activity Guide.

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Lesson 3: Creating and Modifying Purchase Requisitions

Objectives

Upon completion of this lesson, you will be able to perform the following in SMART:

- Create a new purchase requisition, with or without a procurement card
- Create a new purchase requisition, with or without an item from the item table
- Create a new purchase requisition for an item which will become a fixed asset
- Create a new purchase requisition for an item which will become a part of a project
- Create a new purchase requisition, with or without prior authorization request
- Create a new purchase requisition using the Web Tab (Direct Connect)
- Edit, save and submit purchase requisitions
- Use the Manage Requisitions page to manage purchase requisitions

Key Terms

- **(Business) Procurement Card (P-card)**: A business procurement card is used by authorized employees to make purchases on behalf of their agency
- **Prior Authorization Request**: A process that is required by the Division of Purchases to pre-approve certain transactions

Participant Notes:

Topic 1: Creating a Purchase Order Requisition Using an item from the Item Master List and a Procurement Card

- When creating a requisition, SMART requires you to designate a Requester. If the Requester holds a business procurement card for the State of Kansas, SMART enables you to use the Requester's procurement card details as payment for the requisition if desired. It is important to know that you do not need a business procurement card to create a requisition in SMART.
- Requisitioners are able to view masked procurement card information of a Requester (cardholder). The only cards the Requisitioner will have the ability to pay with on a requisition will be cards they have proxies to. A Requisitioner can enter requisitions for any Requester in their business unit, but if they do not have proxy to each Requesters card in the Purchasing module, they will not be able to use the Requesters P-card as a payment method on the requisition.

Walkthrough/Activity

We will now complete a walkthrough using a UPK simulation: Creating Requisitions Using Procurement Cards.

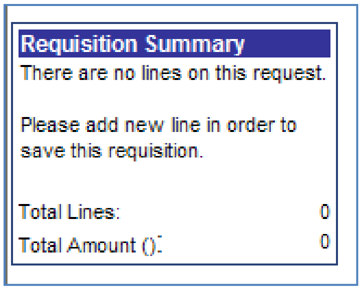
Walkthrough/Activity

You will now complete Activity 6: Creating Requisitions Using Procurement Cards in your Activity Guide.

Participant Notes:

Requisition Summary

Page Name	Navigation
Requisition Summary	eProcurement > Create Requisition

A.


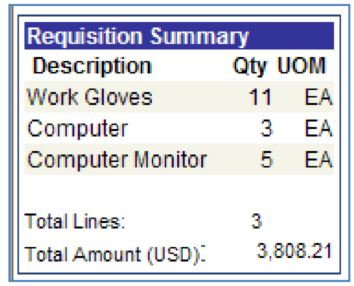
B.


Figure 12 A & B. Create Requisition – Requisition Summary

- **Figure A**: Displays the **Requisition Summary** as it first appears, before any items have been added to the purchase requisition in SMART.
- **Figure B**: As items are added to the purchase requisition in SMART, the **Requisition Summary** keeps a running total (summary) of the items, quantities, requisition lines and cost for the purchase requisition.

Fields	Description
Description	Provides a description of the item(s) and/or service(s) on the requisition
Qty	Indicates the number of item(s) and/or service(s) ordered on the requisition
UOM	Unit of Measure. Indicates the unit of measure for the item(s) and/or service(s)
Total Lines	Indicates the total number of lines on the purchase requisition in SMART
Total Amount (USD)	Indicates the sum total of the purchase requisition in SMART

Table 5. Create Requisition – Requisition Summary

Participant Notes:

Create Requisition - Specify Business Unit and Requester Page

Page Name	Navigation
Specify Business Unit and Requester	eProcurement > Create Requisition

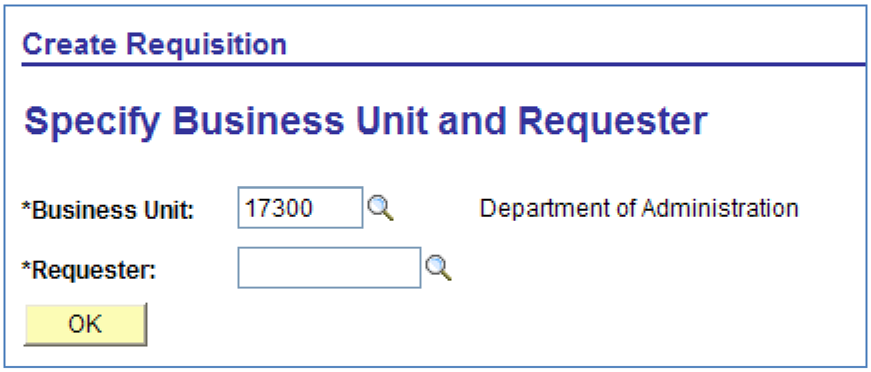


Figure 13. Create Requisition – Specify Business Unit and Requester

Fields	Description
Business Unit	The Business Unit field defaults based on your agency number. Depending on your security level, you can accept the default or enter a different Business Unit number.
Requester	Enter the SMART User ID of the person making the request for goods or services. If you do not know the Requester's SMART User ID, click the LookUp button to view a list of available options.

Table 6. Create Requisition – Specify Business Unit and Requester

Participant Notes:

1. Define Requisition Page – Header Information

Use this page to view default values for requisition lines.

CAUTION!

The values displayed in the Define Requisitions page should NOT be edited on this page. (Use the 3. Review and Submit page to edit or change default value information. The 3. Review and Submit page is covered later in this course).

Page Name	Navigation
Define Requisition	eProcurement > Create Requisition > Specify Business Unit and Requester

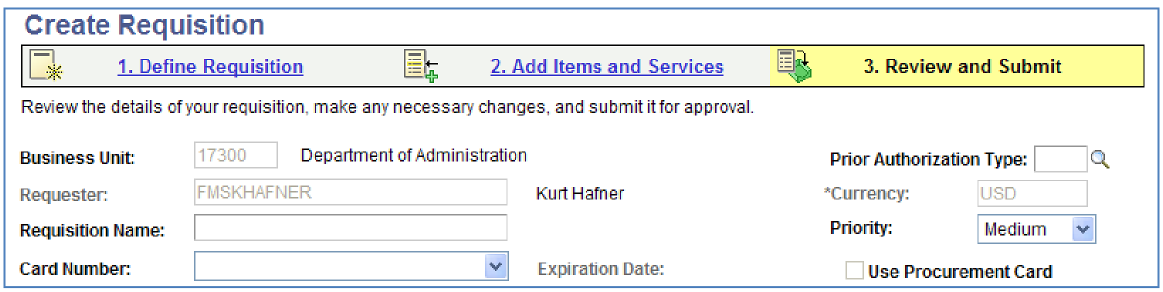


Figure 14. Define Requisition Page – Header Information

Fields	Description
Business Unit	SMART auto defaults the Business Unit (agency)

Participant Notes:

Fields	Description
Prior Authorization Type	Use the Prior Authorization Type field to enter the prior authorization value if applicable. If the requisition does not use a prior authorization, leave the field blank (empty). The default value for this field is blank (empty). . The use of the Prior Authorization field is covered later in this course. **Note**: The use of the Prior Authorization Type field replaces the current State of Kansas Prior Authorization Request paper process.
Requester	SMART auto defaults the Requester that was chosen on the Specify Business Unit and Requester page
Requisition Name	SMART auto defaults the requisition number into the Requisition Name field when the requisition is first saved. Do not enter any information in this field.
Priority	Indicate whether the request is a high, medium, or low priority. Medium priority is the default.

Table 7. Define Requisition Page – Header Information

1. Define Requisition – Line Defaults Expanded

Page Name	Navigation
Define Requisition – Line Defaults Expanded	eProcurement > Create Requisition > Specify Business Unit and Requester

Participant Notes:

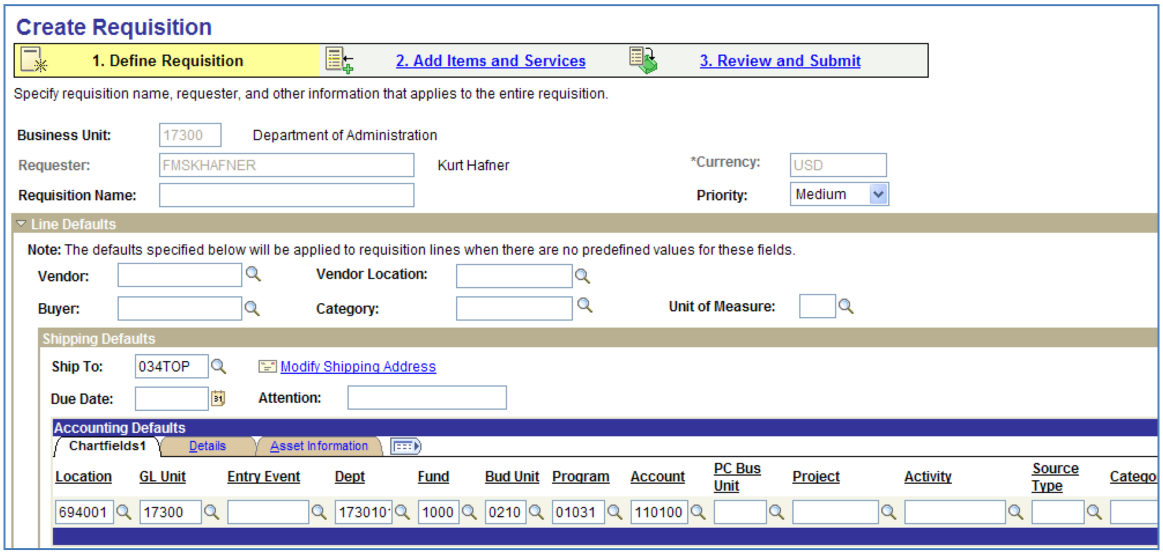


Figure 15. Define Requisition – Line Defaults Expanded

CAUTION!

The values displayed in the Define Requisitions page – Line Defaults, Shipping Defaults, and Accounting Defaults sections should NOT be edited on this page. (Use the 3. Review and Submit page to edit or change default value information. The 3. Review and Submit page is covered later in this course).

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

3. Review and Submit Page

Use this page to review and edit the requisition details, prior to saving and submitting the requisition into the SMART workflow process for approval.

Page Name	Navigation
Review and Submit	eProcurement > Create Requisition > 3. Review and Submit

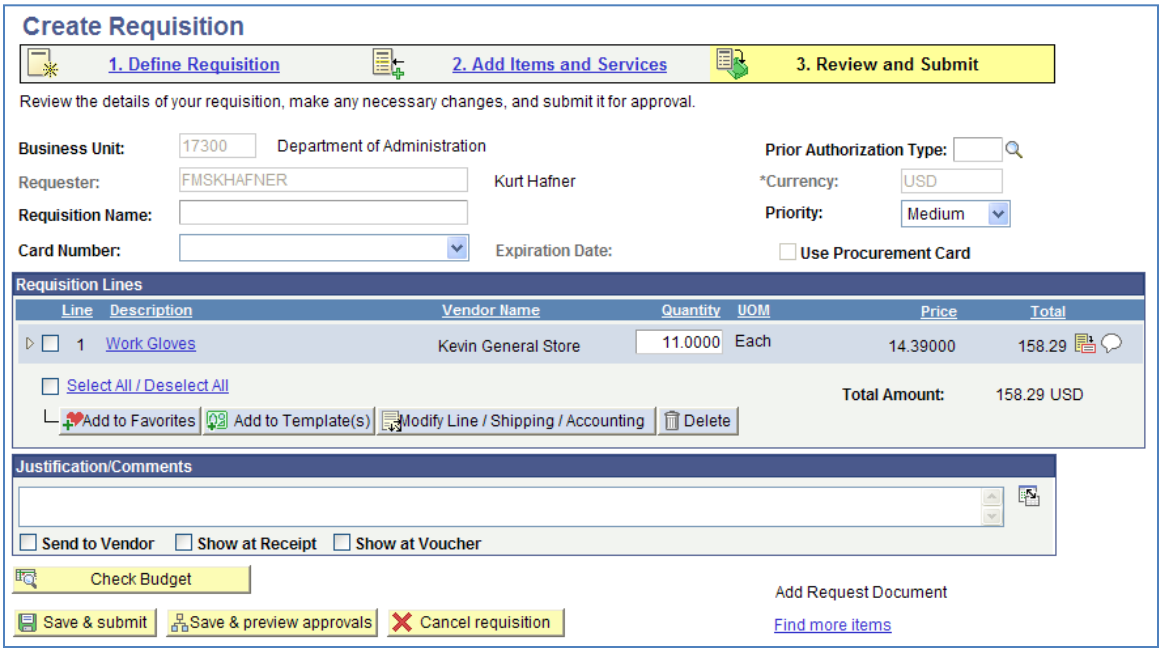


Figure 16. 3. Review and Submit Page

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

3. Review and Submit – Business Procurement Card (P-Card) Information

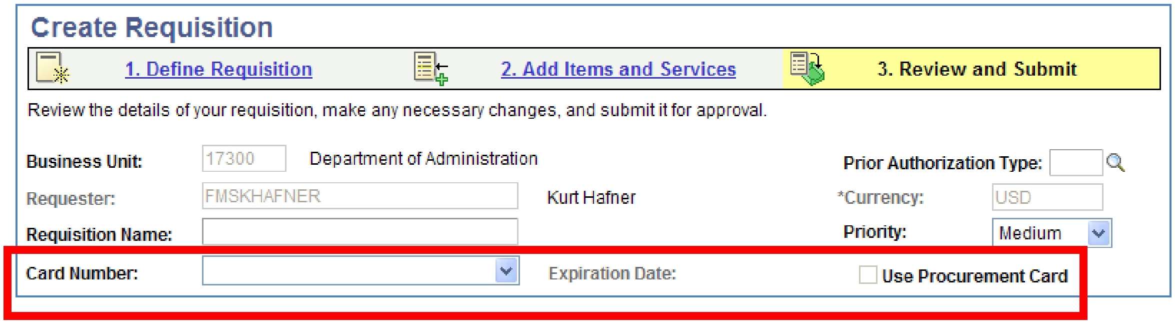


Figure 17. Review and Submit – P-Card Information

Fields	Description
Card Number	Use this field to select the procurement card information if the Requester holds more than one business procurement card for the State of Kansas. Use the drop-down list to select the desired business procurement card number. For security purposes, business procurement card numbers are encrypted in SMART. Therefore, you are able to view only the last four digits of a business procurement card number.
Expiration Date	The Expiration Date defaults based on the business procurement card option chosen in the Card Number field.
Use Procurement Card	Use this checkbox to signify that you want to use the selected business procurement card. This check box auto defaults as selected when a business procurement card is selected in the Card Number field.

Table 8. Review and Submit – P-Card Information

Participant Notes:

3. Review and Submit – Requisition Lines Section

The items added to a requisition are displayed in the **Requisition Lines** section. The Requisition Lines section includes details such as the **Description** of the items, **Quantity** of items ordered, and the **Total Amount** of the purchase.

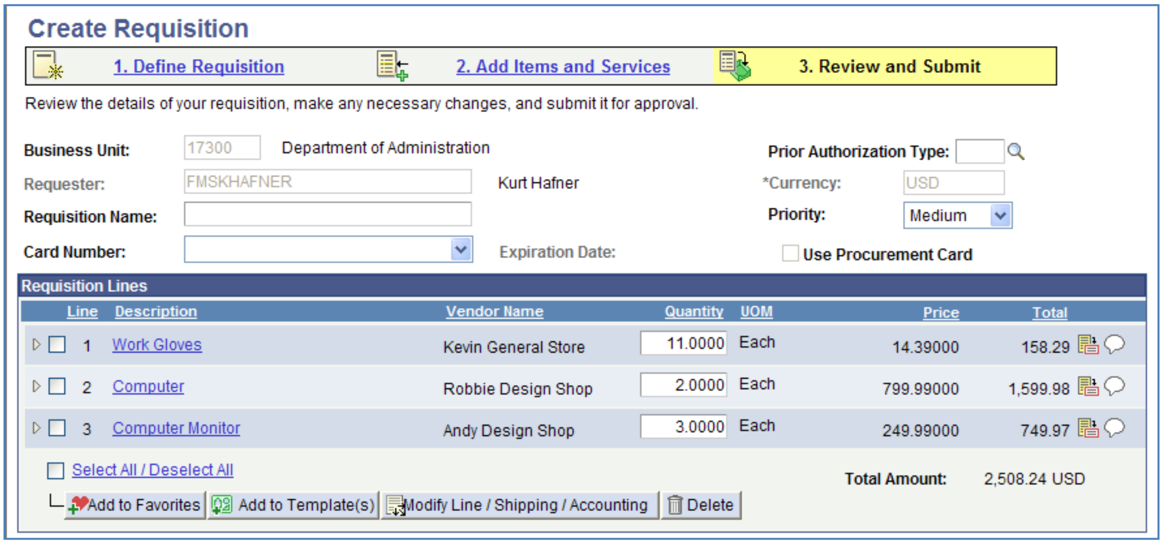


Figure 18. Review and Submit - Requisition Lines Section

Fields	Description
Expand Section button	Click the **Expand Section** button to open the Shipping and Distribution (Accounting) information for the requisition line.
Line Selection checkbox	Use the **Line Selection checkbox** to select the requisition line(s) on which to perform actions.
Line (number)	SMART auto assigns a **Line** number to each requisition line.

Participant Notes:

Fields	Description
Description link	Click the **Description link** on a requisition line to view the item's description in SMART. Use the Return to previous page link to return to the Review and Submit page.
Vendor Name	The **Vendor Name** auto defaults based on the item that was selected from the item master catalog, or defaults based on a special request. (Special requests are covered later in this course)
Quantity	Use this field to enter or edit the **Quantity** of items for the requisition line.
UOM	**UOM = Unit of Measure**. Auto defaults based on the item that was selected from the item master catalog, or defaults based on a special request. (Special requests are covered later in this course)
Price	The **Price** auto defaults based on the item that was selected from the item master catalog, or defaults based on a special request. (Special requests are covered later in this course)
Total	Represents the **Total** (cost) for the requisition line. (Quantity x Price = Total)
Line Details Button	Use this button to open the **Line Details page**. (The use of the Line Details page is covered later in this course).

Participant Notes:

Fields	Description
Line Comments Button	Click this button to open the **Line Comments page**. Use the Line Comments page to enter line comments for the requisition line. Field length is 32700 characters (including spaces and punctuation). (The use of the Line Comments page is covered later in this course).
Select All / Deselect All checkbox	Use the **Select All / Deselect All** checkbox to select or deselect ALL lines on the requisition
Total Amount	Represents the **Total Amount** or cost of the requisition (the sum total of all requisition line totals)
Add to Favorites button	Select the desired item(s) using the line selection checkbox. Click the **Add to Favorites button** to add the item(s) to the Favorites list. (The use of Favorite items is covered later in this course)
Add to Template(s) button	Select the desired item(s) using the line selection checkbox. Click the **Add to Template(s) button** to create a personal template for the selected item(s). (The use of Personal Templates is covered later in this course)
Modify Line / Shipping / Accounting button	Select the desired line(s) using the line selection checkbox. Click the **Modify Line / Shipping / Accounting button** to open the **Modify Line / Shipping / Accounting page**. (The use of the Modify Line / Shipping / Accounting page is covered later in this course)

Participant Notes:

Fields	Description
Delete button	Select the desired line(s) using the line selection checkbox, then click the **Delete button** to delete the lines from the requisition

Table 9. Review and Submit - Requisition Lines Section

Line Details Page

Use the Line Details page to enter contract information, confirm requisition information, and edit additional details for a line.

Note: The State of Kansas is not using the Sourcing Controls section on the Line Details page.

Page Name	Navigation
Line Details	eProcurement > Create Requisition > 3. Review and Submit > Requisition Lines > Line Details Button

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

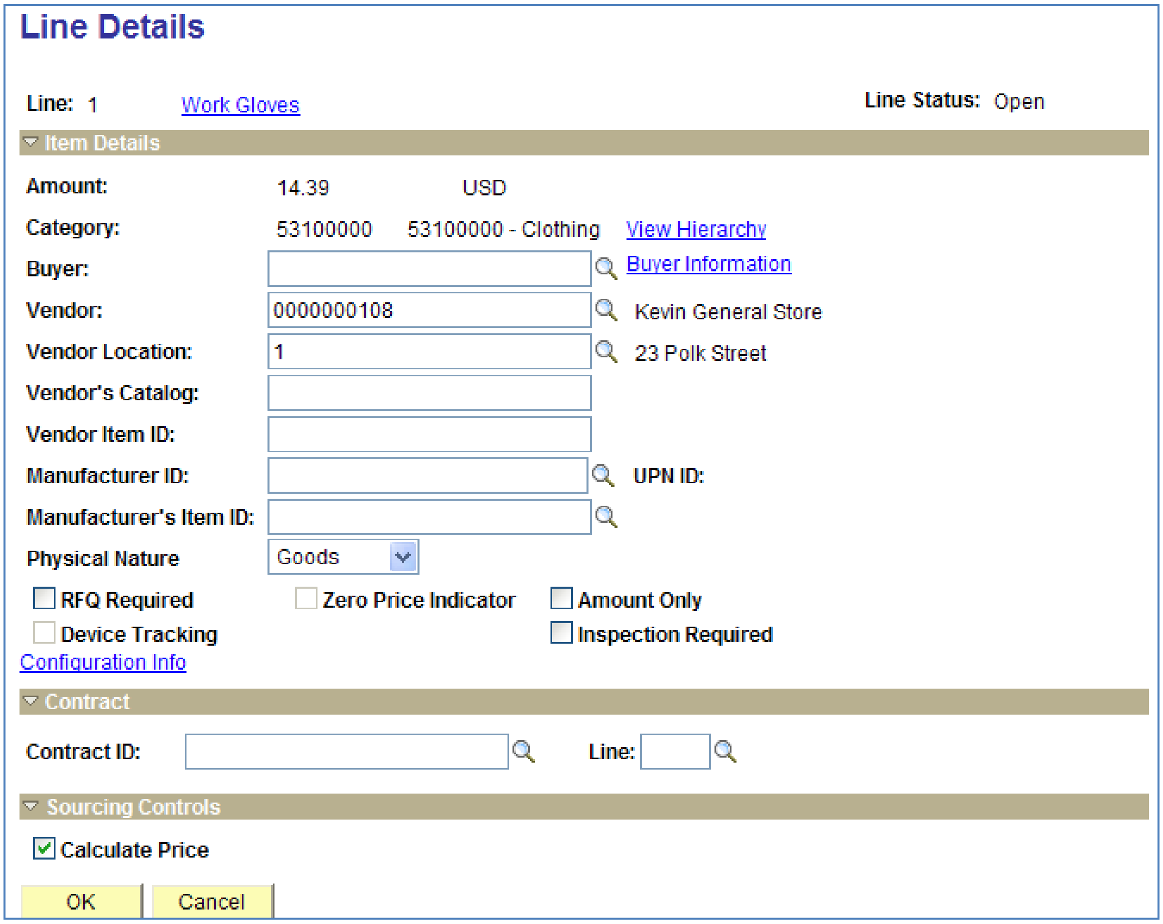


Figure 19. Line Details Page

Participant Notes:

Fields	Description
Buyer	If necessary, use the **Buyer** field to specify the Buyer for the requisition line. If you do not specify a Buyer in the Buyer field, SMART auto defaults the Buyer (based on Requester chosen). SMART auto defaults the Buyer information when the requisition is saved and submitted into the Workflow Approval process.
Vendor	The **Vendor** is auto defaulted by SMART from either the item master catalog, or from a special request. Use the Vendor field to change the vendor if necessary. Use the LookUp button to view and select from a list of available options as needed.
Vendor Location	Use this field to edit the default **Vendor Location** information. If necessary, use the LookUp button to view and select from a list of available options.
Vendor's Catalog	Use this field to enter the **Vendor's Catalog** in which the item can be found
Inspection Required	Use the **Inspection Required** checkbox to designate that an inspection is required for item(s) upon delivery. **Note**: This leaves special delivery instructions on the Inspect Receipts page for the Receiver who creates the receipt in SMART.

Table 10. Line Detail Page Elements

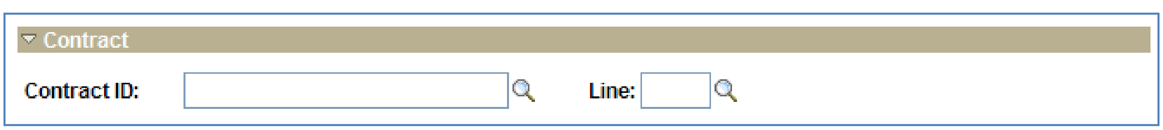


Figure 20. Line Details_Contract Expanded

Participant Notes:

Fields	Data
Contract ID	Use the **Contract ID** field to enter the contract number for this item (if applicable)
Line	The State of Kansas is NOT using the Contract Line field. Please do not enter any information into this field.

Table 11. Line Details_Contract Expanded Fields

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Line Comments Page

Use the Line Comments page to record comments about an item and/or add an attachment.

Page Name	Navigation
Line Comments	eProcurement > Create Requisition > Review and Submit > Requisition Lines > Line Comments button

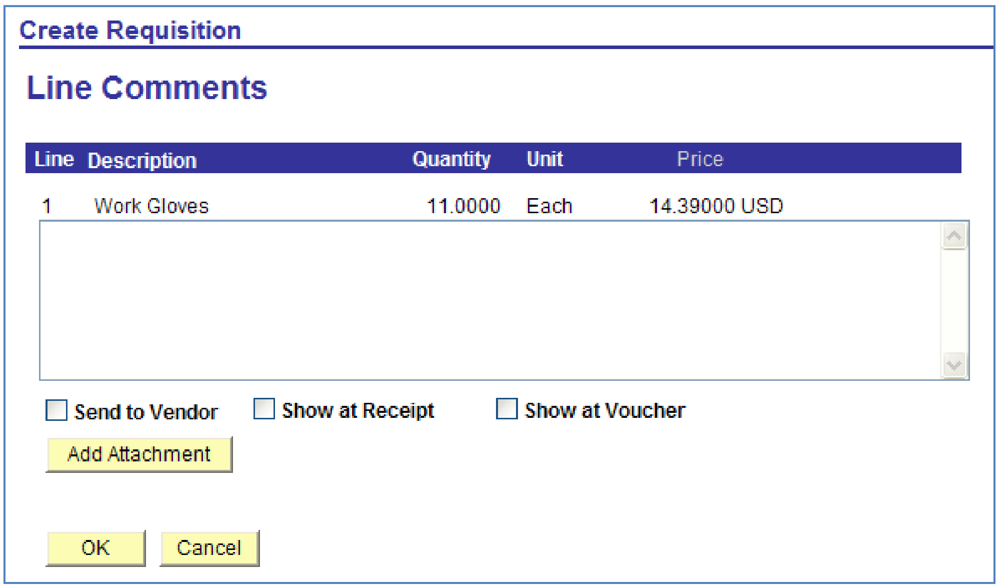


Figure 21. Line Comments Page

Fields	Description
Text Box	Use the text box to enter free text line comments for the requisition line. Field length is 32700 characters (including spaces and punctuation).
Send to Vendor	Use this checkbox to display the line comments to the vendor on the purchase order

Participant Notes:

Fields	Description
Show at Receipt	Use this checkbox to display the comments at the receipt in SMART
Show at Voucher	Use this checkbox to show the comments at the voucher in SMART (Accounts Payable process)
Add Attachment	Click the attach button to browse, locate and upload file(s) from your agency's local server to the requisition line. Examples of requisition line attachments are: Justification related to a Prior Authorization Request, quotes from competing vendors, or a notice from a manufacturer that there are no resellers available for the item(s). **Note**: Please do not use SMART as a document repository. Use the SMART attachment function sparingly and only when absolutely necessary. Thank you.

Table 12. Line Comments Page

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

3. Review and Submit – Requisition Lines Section

Clicking the Expand Section button to the left of a requisition line number opens additional information containing the Shipping and Accounting information for the requisition line. Use the Requisition Lines section to view, edit, and even split distribution and shipping information if necessary.

Page Name	Navigation
Requisition Lines – Split Distribution and Shipping	eProcurement > Create Requisition > Review and Submit > Requisition Lines > Expand Line Information > Requisition Lines

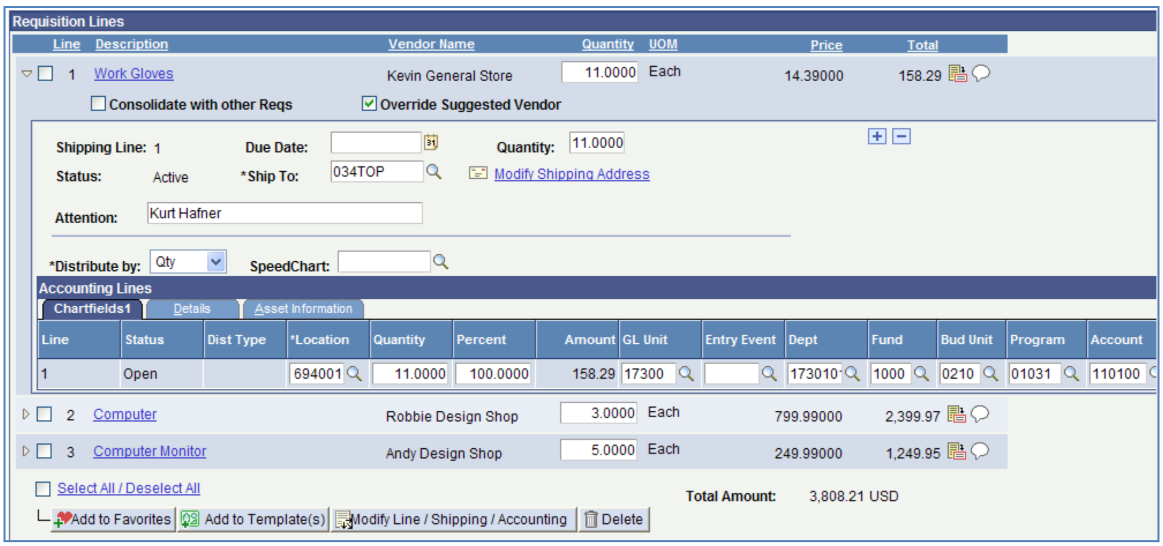


Figure 22. Requisition Lines Expanded – Shipping Line (Split Distribution/Schedule)

Participant Notes:

Fields	Description
Consolidate with other Reqs checkbox	Defaults as selected based on the agency (business unit), and based on the Requester chosen. The use of the **Consolidate with other Reqs checkbox** is agency specific. Please refer to your agency guidelines in the use of this checkbox. **Note**: Selecting this checkbox will not consolidate this requisition with requisitions from a different business unit (agency). This checkbox will consolidate only requisitions with the same Business Unit number.
Override Suggested Vendor	Defaults as selected based on the agency (business unit), and based on the Requester chosen. The use of the **Override Suggested Vendor** checkbox is agency specific. Please refer to your agency guidelines in the use of this checkbox.
Shipping Line (number)	SMART auto assigns a **Shipping Line** number to each shipping line on the requisition. **Note**: Be careful! Do not confuse this number with the requisition line number, or with the Distribution line number.
Due Date	Use this field to enter the **Due Date** for the delivery of the item(s)
Quantity	Use this field to enter the **Quantity** of items for the shipment
+ button	Use the **+ button** to add split the line schedule into multiple Ship To addresses (locations)
- button	Use the **– button** to delete or remove schedule lines (Shipping lines)
Status	Displays the current **Status** of the shipping line. The SMART default value is ‘Active’.
Ship To	Use this field to enter the desired **Ship To** location code (address) for the Shipping Line. If you do not know the Ship To code, click the LookUp button to view and select from a list of available options.
Modify Shipping Address link	Click the **Modify Shipping Address link** to open the **Shipping Address** page. Use the Shipping Address page to enter the desired shipping address (override the default Ship To address). The use of the Shipping Address page is covered later in this course.

Participant Notes:

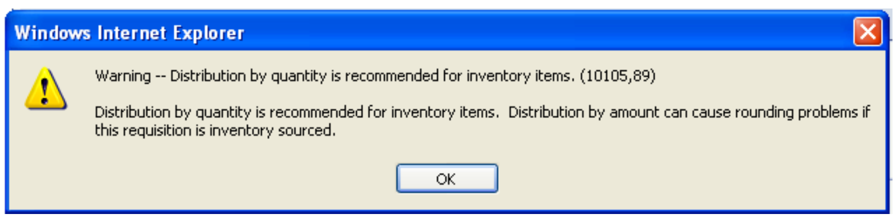
Fields	Description
Attention	SMART auto defaults the Requester's name into the **Attention** field. ***It is State of Kansas best practice NOT to change the default name in the Attention field***. If you need to add an Attention name for delivery purposes, please add the name to the Line Comments page.
Distribute By drop-down list	There are two options for the **Distribute By** field: **Qty** (Quantity) – Qty is the default selection in SMART. Use the Qty option to designate the distribution by quantity **Amt** (Amount) – use the Amt option to designate the distribution by Percentage amount(s) in the Percent field **Note**: If you are creating a requisition line containing an item from the item master catalog, you will receive a **Warning** message dialog box (as shown below). You will not receive this Warning message if you are creating a special request for an item or a service.  If you receive this Warning message, click the **OK** button to proceed. The State of Kansas is not using inventory items, therefore this error message does not apply. Click the OK button to close the message dialog box and proceed with the requisition.
Speedchart	If your agency is using Speedcharts, enter the agency specific Speedchart code into the Speedchart field. If you do not know the SpeedChart code, use the LookUp button to view and select from the list of available options.

Table 13. Requisition Lines Expanded – Shipping Line (Split Distribution/Schedule)

Participant Notes:

3. Review and Submit – Accounting Lines Section – Chartfields1 Tab

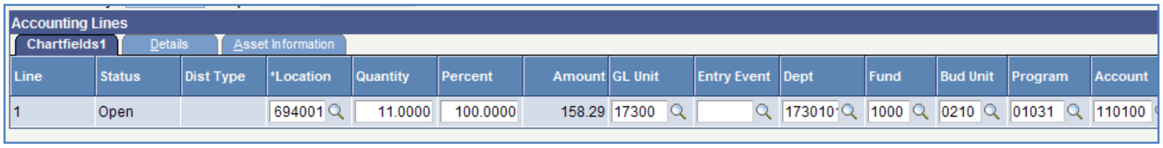


Figure 23. Requisition Lines Expanded – Accounting Lines – Chartfields1 tab

Fields	Description
Chartfields1 tab	Use the Chartfields1 tab to enter or split Chartfield (accounting distribution) information. Required Chartfields for the State of Kansas are: **Dept** (Department), **Fund**, **Bud Unit** (Budget Unit), **Program**, and **Account**. **Note**: If you are entering items for use on a project, the following project Chartfields are also required: **PC Business Unit** (Project Costing business unit), **Project**, and **Activity**. Use the horizontal scrollbar to scroll to the right to access additional Chartfield information, and to access the + and – buttons.
Line	Accounting lines are assigned distribution **Line** numbers. The default distribution line number is '1'. Additional distribution line numbers are auto assigned by SMART when one line distribution is split into multiple distribution lines.
Status	The **Status** field displays the current status for the distribution line. **Note**: The default status value for a new distribution line is 'Open'.
Location	Use the **Location** field to enter the **Location code** for the accounting line. If you do not know the Location code, use the LookUp button to view and select from a list of available options.
Quantity	The **Quantity** field is used to split the distribution by the quantity (of items or services) specified in the Quantity field. Enter the desired quantity for this specific distribution line into the Quantity field. **Note**: You must choose the option of '**Qty**' in the '**Distribute by**' field.
Percent	The **Percent** field is used to split the distribution line by a percentage amount. Enter the desired percent (split percentage amount) for this specific distribution line into the Percent field. **Note**: You must choose the option of '**Amt**' in the '**Distribute by**' field.

Participant Notes:

Fields	Description
GL Unit	Use the **GL Unit** field to enter the GL (General Ledger) Business Unit number. The default value is based on your agency business unit number.
+ button	Use the **+ button** to add additional distribution lines (split the line distribution).
- button	Use the **– button** to remove or delete distribution lines.
Details tab	*The State of Kansas is not using the information on the **Details tab**.* Please do not use the Details tab.

Table 14. Requisition Lines Expanded – Accounting Lines – Chartfields1 Tab

3. Review and Submit – Accounting Lines Section – Asset Information Tab

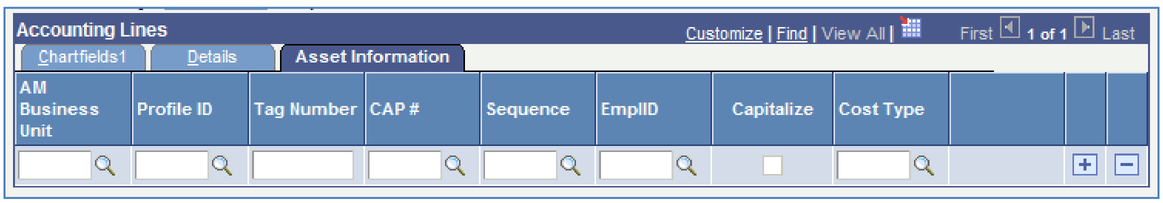


Figure 24. Requisition Lines Expanded – Accounting Lines – Asset Information tab

Fields	Description
Asset Information tab	Use the Asset Information tab to enter the Asset Information for the requisition line(s). **Note**: It is important to know that information MUST be entered into both the **AM Business Unit field AND the Profile ID field** in order for the asset information to be passed into the SMART Asset Management module. If you do not enter information into both these fields, SMART will not recognize the Asset Management information, and will not pass the asset information onto the Asset Management module in SMART.
AM Business Unit	The **AM Business Unit** number MUST be the same business unit number as the PO Business Unit number displayed at the header level of the purchase requisition

Participant Notes:

Fields	Description
Profile ID	Use the **Profile ID** field to enter the Profile ID number. If you do not know the Profile ID number, click the LookUp button to view and select from an available list of options.
Tag Number	Use the Tag Number field to enter the Asset Tag Number for the item.

Table 15. Requisition Lines Expanded – Accounting Lines – Asset Information Tab

Shipping Address Page

Clicking the Modify Shipping Address link opens the Shipping Address page. Use the Shipping Address page to edit the Shipping Address for the Ship To location for the requisition schedule line.

Page Name	Navigation
Shipping Address	eProcurement > Create Requisition > Review and Submit > Requisition Lines > Expand Line Information > Requisition Lines > Modify Shipping Address link

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

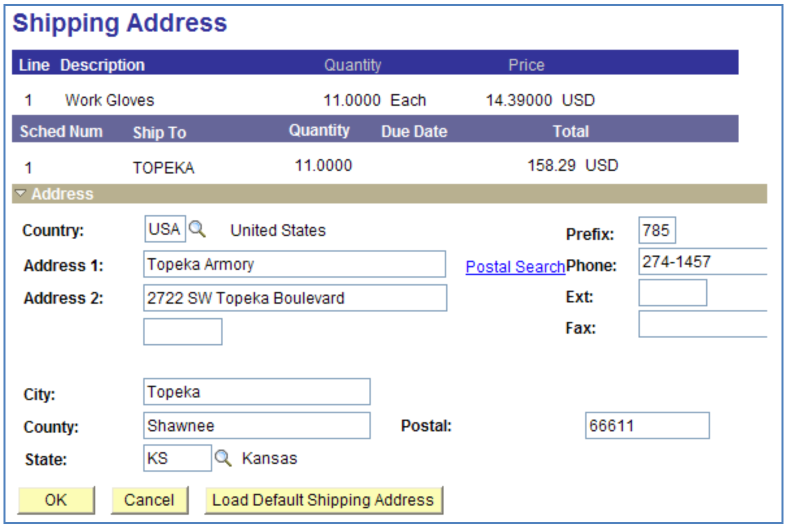


Figure 25. Shipping Address page

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Modify Line / Shipping / Accounting Page

Use the Modify Line / Shipping / Accounting page to ***change schedule (shipping) and distribution (accounting) information for multiple requisition lines at the same time*** when creating or editing a requisition. Using the Modify Line / Shipping / Accounting page enables you to make changes to multiple lines at the same time on the requisition, rather than having to edit every requisition line individually.

Prior to clicking the **Modify Line / Shipping / Accounting button**, use the **Line Selection checkboxes** in the Requisition Lines section of the Review and Submit page to select the desired requisition lines you wish to modify. Alternatively, use the **Select All/Deselect All checkbox** to select or deselect all requisition lines on the requisition.

Use the **Modify Line / Shipping / Accounting page** to update the information for the selected requisition lines. The values and information entered into the Modify Line / Shipping / Accounting page overrides the SMART default information for the requisition lines.

When you have finished entering information into the Modify Line / Shipping / Accounting page, click the **Apply button** to open the **Distribution Change Options page**. (The use of the Distribution Change Options page is covered later in this course).

Page Name	Navigation
Modify Line / Shipping / Accounting	eProcurement > Create Requisition > 3. Review and Submit > Requisition Lines > Line Selection checkboxes OR Select All/Deselect All checkbox > Modify Line / Shipping / Accounting button

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

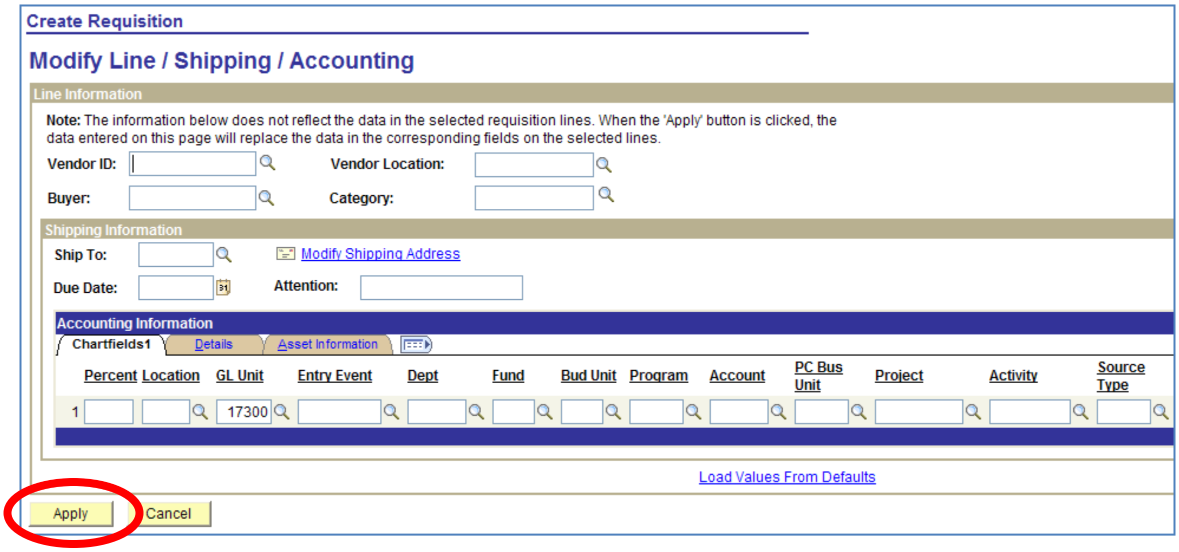


Figure 26. Create Requisition_Modify Line / Shipping / Accounting Page

Fields	Description
Vendor ID	Use the **Vendor ID** field to enter the Vendor ID number. If you do not know the Vendor ID number, click the LookUp button to view and select from the list of available options.
Vendor Location	Use this field to edit the default **Vendor Location** information. If necessary, use the LookUp button to view and select from a list of available options.

Participant Notes:

Fields	Description
Buyer	If necessary, use the **Buyer** field to specify the Buyer for the selected requisition lines. If you do not specify a Buyer in the Buyer field, SMART auto defaults the Buyer (based on Requester chosen). SMART auto defaults the Buyer information when the requisition is saved and submitted into the Workflow Approval process.
Category	Use this field to enter the category code for the selected line item(s). **Note**: Category codes are mapped to Account Chartfield codes in SMART.

Table 16. Create Requisition_Modify Line / Shipping / Accounting Page – Line Information

Fields	Description
Ship To	Use this field to enter the desired **Ship To** location code (address) for the selected Shipping Lines. If you do not know the Ship To code, click the LookUp button to view and select from a list of available options.
Modify Shipping Address link	Click the **Modify Shipping Address link** to open the **Shipping Address** page. Use the Shipping Address page to enter the desired shipping address (override the default Ship To address for the selected Shipping lines). The use of the Shipping Address page is covered earlier in this course.
Due Date	Use this field to enter the **Due Date** for the delivery of the item(s), for the selected requisition lines.

Participant Notes:

Fields	Description
Attention	Use the **Attention** field to enter the name of the contact person for the selected requisition line deliveries. For example: Enter the name of the Requester.

Table 17. Create Requisition_Modify Line / Shipping / Accounting Page – Shipping Information

Fields	Description
Chartfields1 tab	Use the Chartfields1 tab to enter or split Chartfield (accounting distribution) information. Required Chartfields for the State of Kansas are: **Dept** (Department), **Fund**, **Bud Unit** (Budget Unit), **Program**, and **Account**. **Note**: If you are entering items for use on a project, the following project Chartfields are also required: **PC Business Unit** (Project Costing business unit), **Project**, and **Activity**. Use the horizontal scrollbar to scroll to the right to access additional Chartfield information, and to access the + and – buttons.
Asset Information tab	Use the Asset Information tab to enter the Asset Information for the requisition line(s). **Note**: It is important to know that information MUST be entered into both the **AM Business Unit field AND the Profile ID field** in order for the asset information to be passed into the SMART Asset Management module. If you do not enter information into both these fields, SMART will not recognize the Asset Management information, and will not pass the asset information onto the Asset Management module in SMART.

Table 18. Create Requisition_Modify Line / Shipping / Accounting Page – Accounting Information

Note: Please refer to the **'3. Review and Submit – Requisition Lines Section**' for more information pertaining to the use of the fields located in the Chartfields1 Tab and the Asset Information tab.

Participant Notes:

Distribution Change Options Page

Clicking the Apply button on the Modify Line / Shipping / Accounting page prompts SMART to open the **Distribution Change Options page**.

The Distribution Change Options page allows you to select instructions that tell SMART how to apply the changes you made on the Modify Line / Shipping / Accounting page. The Distribution Change Options page offers three options:

- All Distribution Lines
- Matching Distribution Lines
- Replace Distribution Lines

Note: Definitions and explanations of these options are provided following the screenshot (below).

Select the desired option using the radio button to the left of the option. You are able to use the Distribution Change Options page while creating or editing requisitions.

Page Name	Navigation
Distribution Change Options	eProcurement > Create Requisition > 3. Review and Submit > Requisition Lines > Modify Line / Shipping / Accounting > Apply button

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

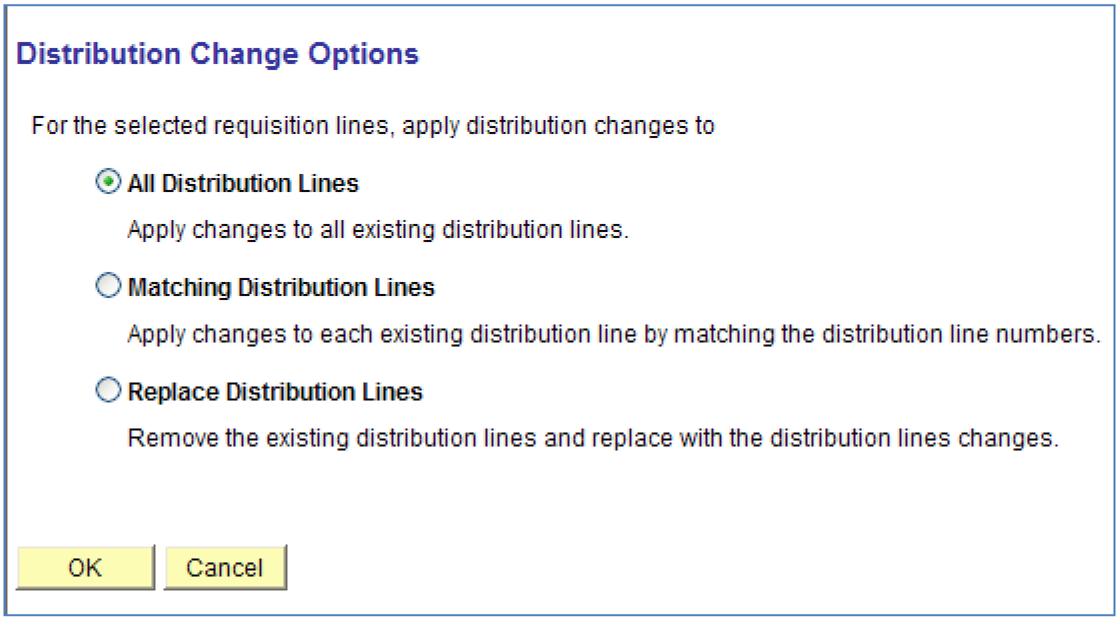


Figure 27. Distribution Change Options Page

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Fields	Description
All Distribution Lines	The **All Distribution Lines** option is the default selection for the State of Kansas. Chartfield values entered into a single distribution line on the Modify Line / Shipping / Accounting page are applied to **ALL selected requisition lines** (that were selected on the Review and Submit page using the Line Selection checkbox/es). Only Chartfield values that are entered on the Modify Line / Shipping / Accounting page are updated. Chartfields left blank (empty) do not override the SMART default values for the selected requisition lines. Any requisition lines that are not selected (on the Review and Submit page) retain all SMART default information. The distribution information for these unselected lines is not changed.

Participant Notes:

Fields	Description
Matching Distribution Lines	Enter the desired Chartfield values into **specific distribution line(s)** on the Modify Line / Shipping / Accounting page. **For example**: If you enter Chartfield values for only distribution Line numbers 1, 3 and 7, then only distribution Line numbers 1, 3 and 7 are updated. All other distribution lines are not updated. Chartfields left blank (empty) do not override the SMART default values for the selected lines. Any requisition lines that are not selected (on the Review and Submit page) retain all SMART default information. The distribution information for these unselected lines is not changed

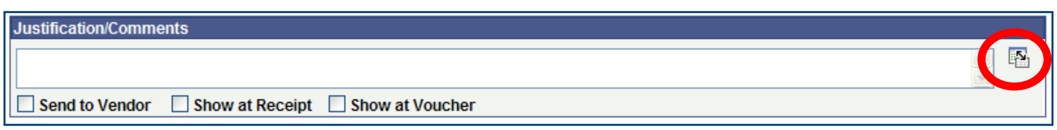
Participant Notes:

Fields	Description
Replace Distribution Lines	Chartfield values entered into a single distribution line on the Modify Line / Shipping / Accounting page are applied to **ALL selected requisition lines** (that were selected on the Review and Submit page using the Line Selection checkbox/es). Chartfield values that are entered on the Modify Line / Shipping / Accounting page are updated. Chartfields left blank (empty) are overridden with blank fields (deletes SMART Chartfield default values) Any requisition lines that are not selected (on the Review and Submit page) retain all SMART default information. The distribution information for these unselected lines is not changed.

Table 19. Distribution Change Options Page

3. Review and Submit – Justifications/Comments Field

Page Name	Navigation
Justification/Comments	eProcurement > Create Requisition > 3. Review and Submit > Justification/Comments



Participant Notes:

Figure 28.A. Review and Submit_Justification/Comments Field

Figure 28.B. Review and Submit_Justification/Comments_Expand Section

Fields	Description
Figure A - Justification/Comments and the Expand button 	Use the **Justification/Comments** free text field to enter the reason for the purchase requisition creation. Field length is 32700 characters (including spaces and punctuation). If desired, click the **Expand Section** button in the Justification/Comments section. Clicking the Expand section button opens a new window displaying the Justification / Comments field.

Participant Notes:

Fields	Description
Figure B – Justification/Comments in new window and the OK button 	If you clicked the Expand button to open the Justification/Comments field in a new window, enter comments into the free text field and click the **OK** button. Clicking the OK button closes the window, and retains the comments in the Justification/Comments text box on the Review and Submit page.

Table 20. Review and Submit_Justification/Comments

3. Review and Submit – Check Budget Button

Page Name	Navigation
Check Budget button	eProcurement > Create Requisition > 3. Review and Submit

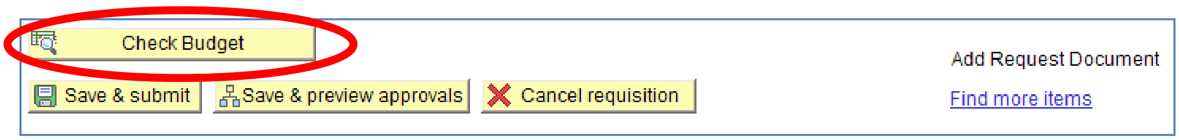


Figure 29. Review and Submit_Check Budget button

If your agency is set up for purchase requisitions to pre-encumber funds (only four agencies are doing this at go live July 2010), then clicking the **Check Budget button** prompts SMART to simultaneously combination edit (check for valid ChartField accounting strings), and creates a pre encumbrance for the budget funds. The pre-encumbrance becomes a hard encumbrance at the time of purchase order creation (batch process for auto sourcing in SMART).

Participant Notes:

CAUTION!

Most state agencies are NOT set up to pre-encumber funds at Go Live (in July 2010). If your agency is not using pre-encumbrances, please <u>DO NOT USE</u> the Check Budget button as this may potentially cause performance issues in SMART.

Note: In extremely rare circumstances, the Check Budget button may be used by non-pre-encumbrance agencies as an ***exception process*** to the regularly scheduled batch process for budget checking in SMART.

3. Review and Submit – Action buttons

Page Name	Navigation
Review and Submit	eProcurement > Create Requisition > 3. Review and Submit > Action buttons and link (bottom left corner of page)

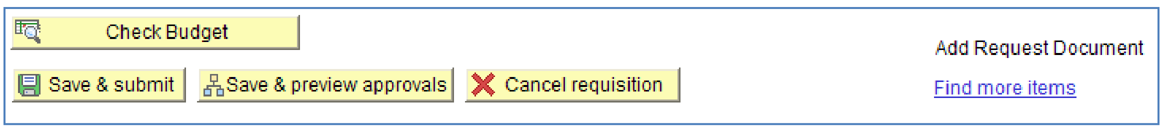


Figure 30. Review and Submit_Action buttons

Fields	Description
Save & submit button	Use the **Save & submit button** to save the requisition and submit it directly into the Workflow approval process. Clicking the Save & submit button opens the **Confirmation** page. The use of the Confirmation page is covered later in this course.

Participant Notes:

Fields	Description
Save & preview approvals button	Use the **Save & preview approvals button** to save the requisition for later use. *Clicking the Save & preview approvals button **DOES NOT** submit the requisition into the Workflow approval process*. Clicking the Save & preview approvals button opens the **Confirmation** page. The use of the Confirmation page is covered later in this course.
Cancel requisition button or Cancel Changes button **CAUTION!**	Use the **Cancel requisition button** to cancel the entire purchase requisition in SMART. ***Important! The cancellation of a purchase requisition CANNOT be reversed.*** SMART provides a message prompt asking you to confirm your cancellation decision. **Note**: Depending on the status and/or workflow approval processing of the requisition, this button's title may appear as '**Cancel Changes**'. Use the Cancel Changes button to cancel changes you have made to the requisition.
Find more items link	Clicking the **Find more items link** navigates you away from the '3. Review and Submit' page, and returns you to the '2. Add items and services' page.

Table 21. Review and Submit_Action buttons

Participant Notes:

Confirmation Page

Page Name	Navigation
Confirmation page	eProcurement > Create Requisition > 3. Review and Submit > Save & preview approvals button OR Save & Submit button

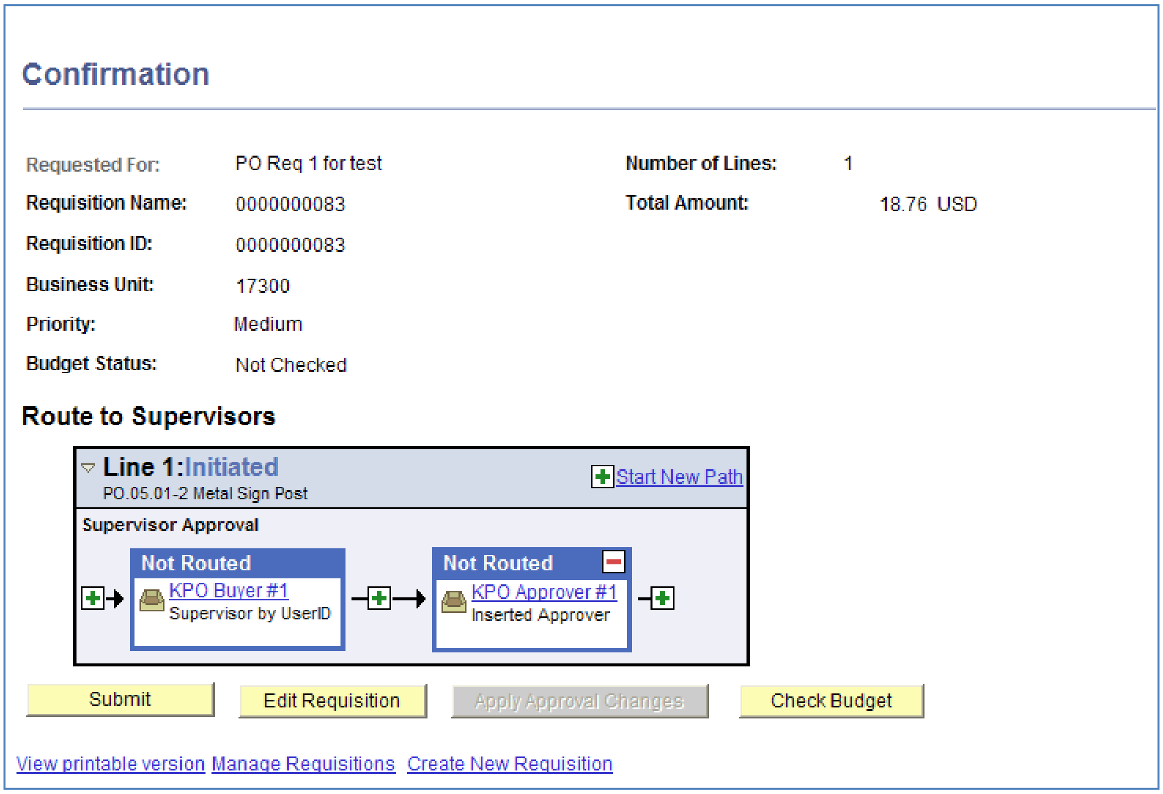


Figure 31. Confirmation Page

Clicking the 'Save & preview approvals' button or the 'Save & Submit' button on the '3. Review and Submit' page opens the **Confirmation** page.

Participant Notes:

Fields	Description
Requested For	Displays the name of the Requester
Number of Lines	Displays the total number of lines on the requisition
Requisition Name	When you click either the Save & submit button or the Save & preview approvals button, SMART auto assigns a requisition ID number to the requisition. The requisition ID number is defaulted into the **Requisition Name** field.
Total Amount	Displays the **Total Amount** (total cost) for the requisition
Requisition ID	When you click either the Save & submit button or the Save & preview approvals button, SMART auto assigns a requisition ID number to the requisition. The requisition ID number is defaulted into the **Requisition ID** field.
Business Unit	Displays the **Business Unit** number for the agency
Priority	Displays the **Priority** level designated on the requisition
Budget Status	There are three **Budget Status** options: • **Not Checked**: Budget Checking has not occurred. The Budget Check batch process has not run, or a manual Budget Check has not been performed on the requisition. This status is the default value for a new requisition. • **Valid:** The Budget Checking batch process has been run. SMART validated all accounting information as correct (combination edits). The requisition successfully passed the Budget Checking process which changed the status to 'Valid'. • **Error:** The Budget Checking batch process has run. SMART identified error/s in the accounting information for the requisition. The requisition did not pass Budget Checking successfully, therefore the status was changed to 'Error'

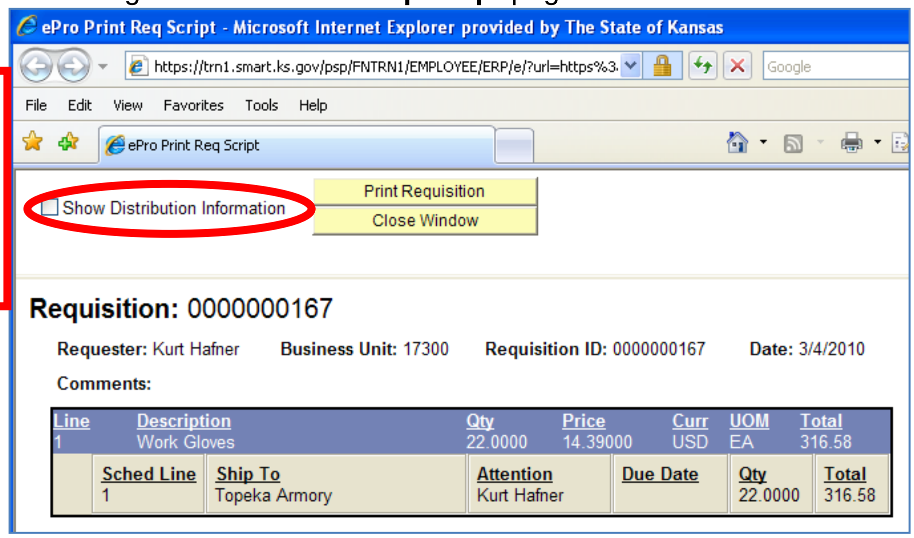
Participant Notes:

Fields	Description
Route to Supervisors	The **Route to Supervisors** section displays the workflow path for the requisition approval process. **Note**: The Workflow Approval process is not covered in this course. The Workflow Approval process is covered in the GN203 – Performing Approvals course.
Submit button	Click the **Submit button** to submit the requisition into the Workflow Approval process. Depending on the life cycle stage of the requisition, this button may be enabled or disabled for use.
Edit Requisition button	Click the **Edit Requisition button** to open the requisition. Depending on the life cycle stage of the requisition, this button may be enabled or disabled for use.
Apply Approval Changes button	The **Apply Approval Changes** button is not being used by the State of Kansas.
Check Budget button	The **Check Budget button** on the Confirmation page performs the same functionality as the Check Budget button on the Review and Submit page. Please refer to **3. Review and Submit – Check Budget Button** for more information about the use of the Check Budget button.

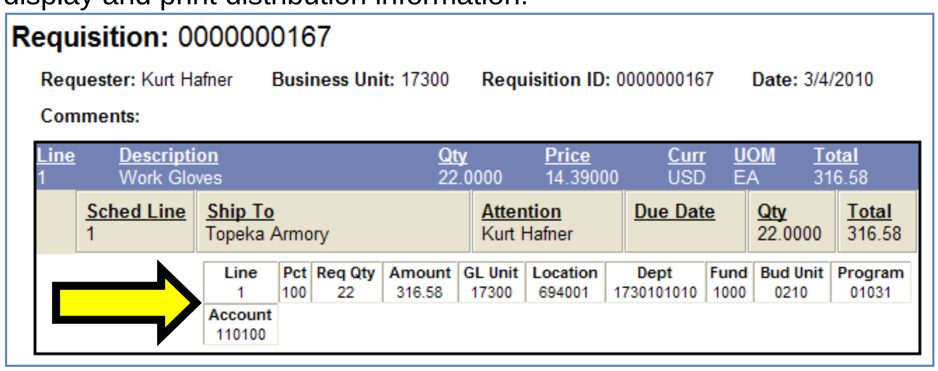
Participant Notes:

<table>
<tr><th>Fields</th><th>Description</th></tr>
<tr><td>View printable version link

It is State of Kansas best practice NOT to print requisitions.</td><td>Clicking the View printable version link opens a new window containing the e-Pro Print Req Script page:



If desired, select the Show Distribution Information checkbox to display and print distribution information:



Click the Print Requisition button to open your local printer options.
Click the Close Window button to close the e-Pro Print Req Script Req Script window and return to the Confirmation page.</td></tr>
</table>

Participant Notes:

Fields	Description
Manage Requisitions link	Click the **Manage Requisitions link** to navigate to the **Manage Requisitions page**. The use of the Manage Requisitions page is covered later in this course.
Create New Requisition link	Click the **Create New Requisition link** to begin the creation of a new requisition in SMART. Clicking the Create New Requisition link navigates you to the Specify Business Unit and Requester page in the SMART e-Procurement module.

Table 22. Confirmation Page

Topic 2: Creating a Purchase Requisition without an Item from the Item Master List and without a Procurement Card

- Only statewide contract items appear in the item master catalog in SMART (at Go Live, July 2010). Your agency may need to order items that are not in the SMART item master catalog. Use the Special Request Page to requisition items that you cannot locate by browsing the catalog or by using an item search.

2. Add Items and Services - Special Request Page

Use the **Special Request page** to create a request for a special item or service. A special item is an item that is not listed in the SMART item master catalog (which contains only statewide contract items), or in a Direct Connect (Web) catalog. You can choose links on the Special Request page to create Special Items, Fixed Cost Service, Variable Cost Service, and Time and Materials.

Page Name	Navigation
Special Request	eProcurement > Create Requisition > 2. Add Items and Services > Special Request Tab

Participant Notes:

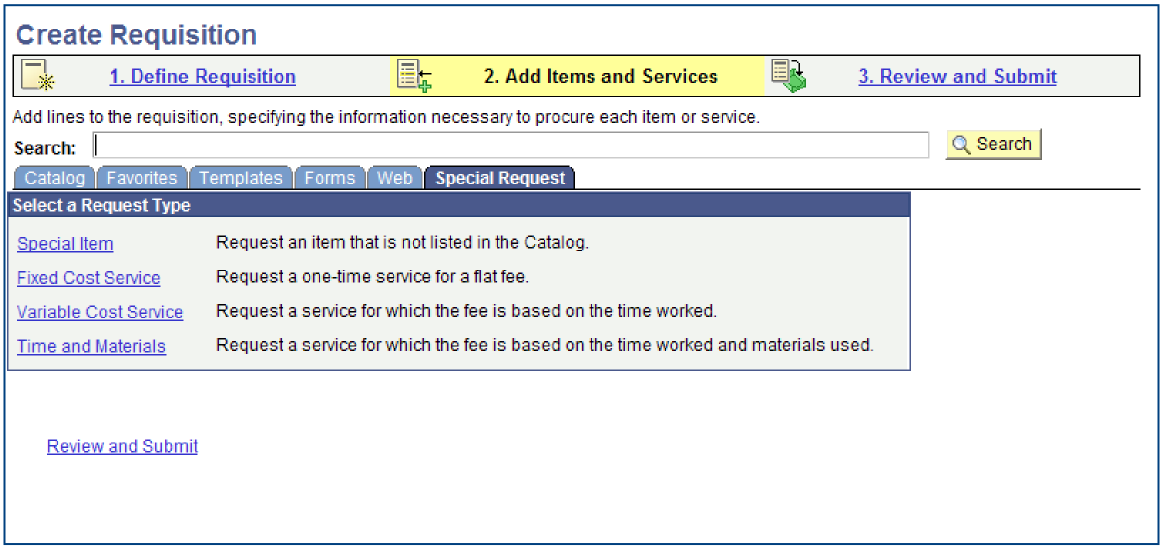


Figure 32. Add Items and Services_Special Request Tab

Walkthrough/Activity

We will now complete Activity 7: Creating a Purchase Requisition Using a Special Request for Items in your Activity Guide.

2. Add Items and Services - Special Item Request Page

Use this page to request an item that is not in a catalog.

Page Name	Navigation
Special Request	eProcurement > Create Requisition > 2. Add Items and Services > Special Request Tab >Special Item Link

Participant Notes:

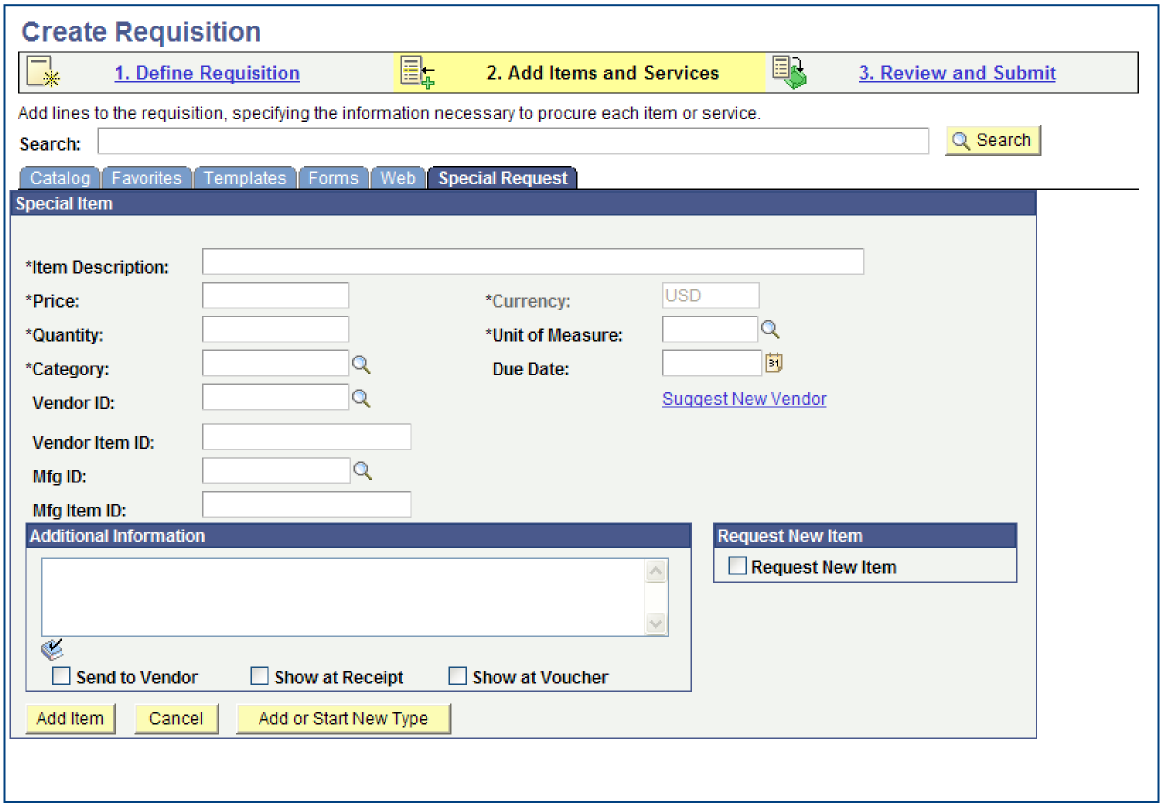


Figure 33. Special Request Page – Special Item Link Expanded

Note: Fields notated with an asterisk (*) in SMART are required fields that must have data entered into them.

Participant Notes:

Fields	Description
Item Description	Use the **Item Description** field to enter a description of the item you are requesting. Field length is 254 characters (including spaces and punctuation).
Price	Use the **Price** field to enter the price of the item you are requesting (= price per unit of measure)
Quantity	Use the **Quantity** field to enter the quantity of the item(s) you are requisitioning
Unit of Measure	Use the **Unit of Measure** field to enter the unit of measure (UOM) for the item(s) you are requisitioning. If you do not know the UOM, click the LookUp button to view and select from a list of available options.
Category	*When creating a Special Request in SMART, you MUST populate a **Category** code.* Use the **Category** field to enter the Category code number for the item(s) you are requisitioning. **Note**: Category codes are mapped to Account Chartfield codes in SMART. If you do not know the Category code, click the LookUp button to view and select from a list of available options.
Vendor ID	*When creating a Special Request in SMART, you need to populate a **Vendor ID**.* If you do not know the Vendor ID number, click the LookUp button to view and select from a list of available options. **Note**: Vendor ID's are maintained by Central. If you cannot locate the Vendor ID, please add the Vendor information to the Additional Information text field and leave the Vendor ID field empty (blank).
Vendor Item ID	Use the **Vendor Item ID** field to enter a Vendor's reference or product number for the item. For example: The number/reference that the vendor uses in their catalog. This is an optional field in SMART.

Participant Notes:

Fields	Description
Mfg ID	Use the **Mfg ID** field to enter the manufacturer's ID number in SMART. If you do not know the Mfg ID number, click the LookUp button to view and select from a list of available options. This is an optional field in SMART.
Mfg Item ID	Use the **Mfg Item ID** field to enter the manufacturer's reference or product number for the item. For example SKU (Stock Keeping Unit) number. This is an optional field in SMART.
Additional Information	Use the **Additional Information** field to enter any additional information about the item. This field is a free text field.
Send to Vendor	Use the **Send to Vendor checkbox** to display the Additional Information text to the vendor on the purchase order
Show at Receipt	Use the **Show at Receipt checkbox** to display the Additional Information text at the receipt in SMART
Show at Voucher	Use the **Show at Voucher checkbox** to show the Additional Information text at the voucher in SMART (Accounts Payable process)
Request New Item	***The State of Kansas is not using this functionality***. Please do NOT select the Request New Item checkbox.
Add Item button	Once you have completed entering all information into the Special Item request form, click the **Add Item button** to have SMART transfer the special item information to the 3. Review and Submit page.
Cancel button	Click the **Cancel button** to cancel the special request for the item, and to return to the 2. Add Items and Services page.

Participant Notes:

Fields	Description
Add or Start New Type button	Once you have completed entering all information into the Special Item request form, click the **Add or Start New Type button** to have SMART transfer the special item information to the 3. Review and Submit page. Additionally, SMART transfers you back to the Special Request page.

Table 23. Special Request Page – Special Item Link Expanded

Topic 3: Creating a Purchase Requisition for a Fixed Asset Item

- Your agency Asset Processor should communicate with you any time you purchase an item that will become an asset
- Asset details are entered at the line level
- If you consider an item to be an asset, you must populate both the AM Unit field and the Profile ID field. Both these fields must contain data for the information to be passed through SMART into the Asset Management module. If only one of these fields is populated, SMART will not consider the item an asset, and will not pass the asset information onto the Asset Management module.
- The AM Unit number must match the PO Business Unit number displayed at the header level

Walkthrough/Activity

We will now complete Activity 8: Create a Purchase Requisition for a Fixed Asset Item in your Activity Guide.

Participant Notes:

Topic 4: Creating a Purchase Requisition for a Project Item

- Your agency Project Manager should communicate with you any time you purchase an item that is used for a project and/or grant that is setup in SMART Project Costing
- To associate an item to a particular project, enter the project ChartFields at the line level. These fields include Project Business Unit, Project ID, Activity, Source Type, Category, and Subcategory
- To split a line's Distribution (Chartfields) and/or Schedule information (such as Ship To location), navigate to the Review and Submit page – Requisition Lines (expanded). Use the '+' button to add Distribution/Schedule information, or use the '–' button to remove Distribution/Schedule information as required.

Walkthrough/Activity

We will now complete an Activity 9: Create a Purchase Requisition for a Project Item in your Activity Guide.

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Topic 5: Creating a Purchase Requisition using Prior Authorization Request

- On occasion, items are needed that cannot go out for competitive bid due to circumstances. Some examples might be an item that is only sold by one vendor in the entire country, or an emergency situation during which failing to procure the item immediately would be detrimental to the agency's function. In these circumstances, an agency must request prior authorization from the Division of Purchases to procure an item outside of the bid process.

Purchase requisitions that require Prior Authorization:

- Purchase requisitions containing Prior Authorization lines should contain ONLY Prior Authorization lines.
- Please do NOT add non-Prior Authorization lines/items to a purchase requisition that contains Prior Authorization lines/items. Please create a new (separate) purchase requisition for non-Prior Authorization lines/items.
- Please do NOT mix Prior Authorization types on a purchase requisition. Prior Authorization types are entered at the HEADER level of a purchase requisition, therefore only ONE type of Prior Authorization can be assigned to each purchase requisition.
- If you need to use multiple Prior Authorization types when creating a purchase requisition, please create multiple purchase requisitions - one purchase requisition for EACH Prior Authorization type.
- For example: The State of Kansas will not approve a purchase requisition which contains a line item that is a Prior Authorization type of OKP (Only Known

Participant Notes:

Provider), and that contains a line item that is a Prior Authorization type of USE (Purchase of Used Equipment) on the same purchase requisition. In this example, the Requisitioner needs to create two (2) separate purchase requisitions, the first using the Prior Authorization type of OKP, and the second purchase requisition using the Prior Authorization type of USE.

Walkthrough/Activity

We will now complete Activity 10: Creating a Purchase Requisition That References a Prior Authorization Request in your Activity Guide.

Topic 6: Using a Web Catalog to Create a Purchase Requisition

SMART contains the functionality to allow you to search certain vendor's online catalogs so you can add items to the requisition in SMART. Use the **Web** tab (Direct Connect) while creating the requisition in SMART to gain access to the vendor's online catalog. Once you have located the items you need in the vendor's catalog, SMART imports the item information into the requisition. This topic uses the example of Staples Advantage (Corporate Express) to order office supplies.

- Staples will send an email directly to the Requester when the purchase order is received, and then another email when the item is shipped.
- The State of Kansas minimum order amount for a Staples order is $35.00 for each Ship To Location.
- Extra delivery charges appear for various reasons, for example: Furniture with setup required, special delivery services, or furniture non in stock, etc.
- You are able to modify a Ship To address or location on the purchase requisition in SMART.

Participant Notes:

- You cannot split one purchase requisition line into multiple ship to locations (for Direct Connect/Web Catalog purchase requisitions).
- It is important to know that Staples change their web catalog prices quarterly.
- For Staples (Direct Connect) purchase requisitions on which you want to add an Attention name for delivery purposes, please add the name of the contact in the Line Comments page for the requisition line.
- For Staples (Direct Connect) purchase requisitions that have multiple Ship To locations, do NOT change the name in the Attention field. Changing the default name in the Attention field may cause an issue with the Direct Connect interface between the State of Kansas and Staples website.

Walkthrough/Activity

We will now complete a walkthrough using a UPK simulation: Creating Requisitions Using the Web Catalog.

2. Add Items and Services - Web Tab

Use this page to access the Staples Advantage website for office supplies.

Page Name	Navigation
Web Catalog	eProcurement > Add Items and Services > Web Tab

Participant Notes:

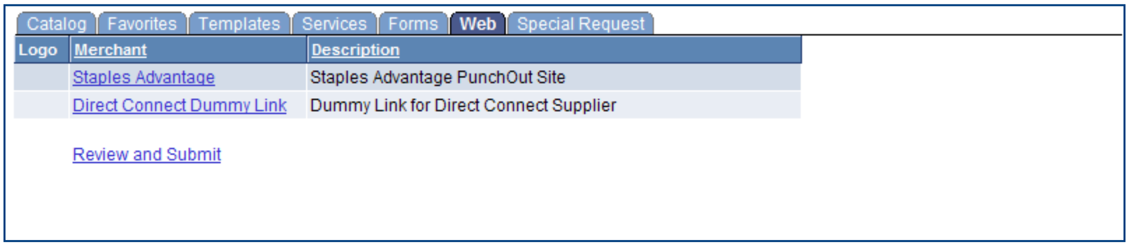


Figure 34. Web Catalog Page Expanded

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Web Tab - Staples Advantage Online Catalog

Use this page to order office supplies.

Page Name	Navigation
Staples Advantage Online Catalog	eProcurement > Add Items and Services > Web Tab >Staples Advantage Link

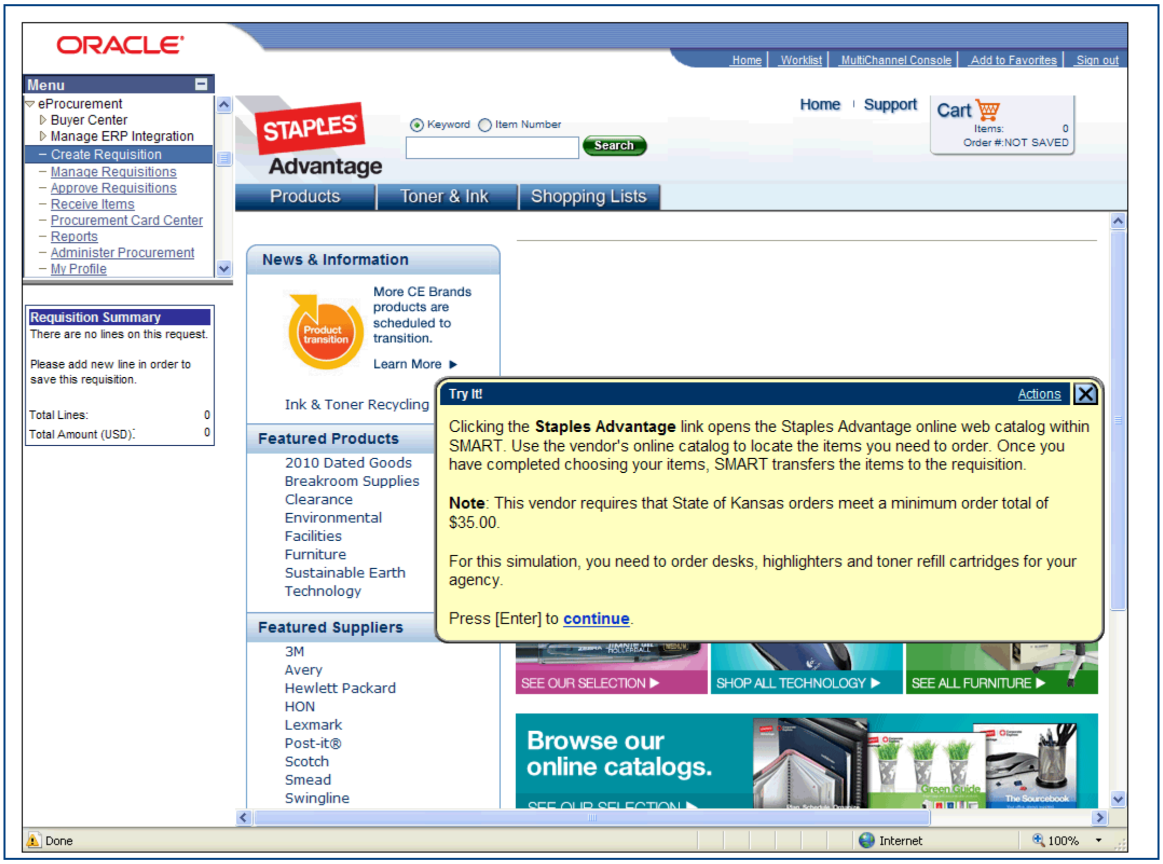


Figure 35. Staples Advantage Online Catalog

Participant Notes:

Fields	Description
Keyword	Use this field to enter search criteria/keyword. The more specific the criteria, the better the search results.
Item Number	Use this radio button to search by an item number from the Staples catalog

Table 24. Staples Advantage Online Catalog Page Elements

Staples - Item Search Page

Use this page to select the item(s) you wish to purchase.

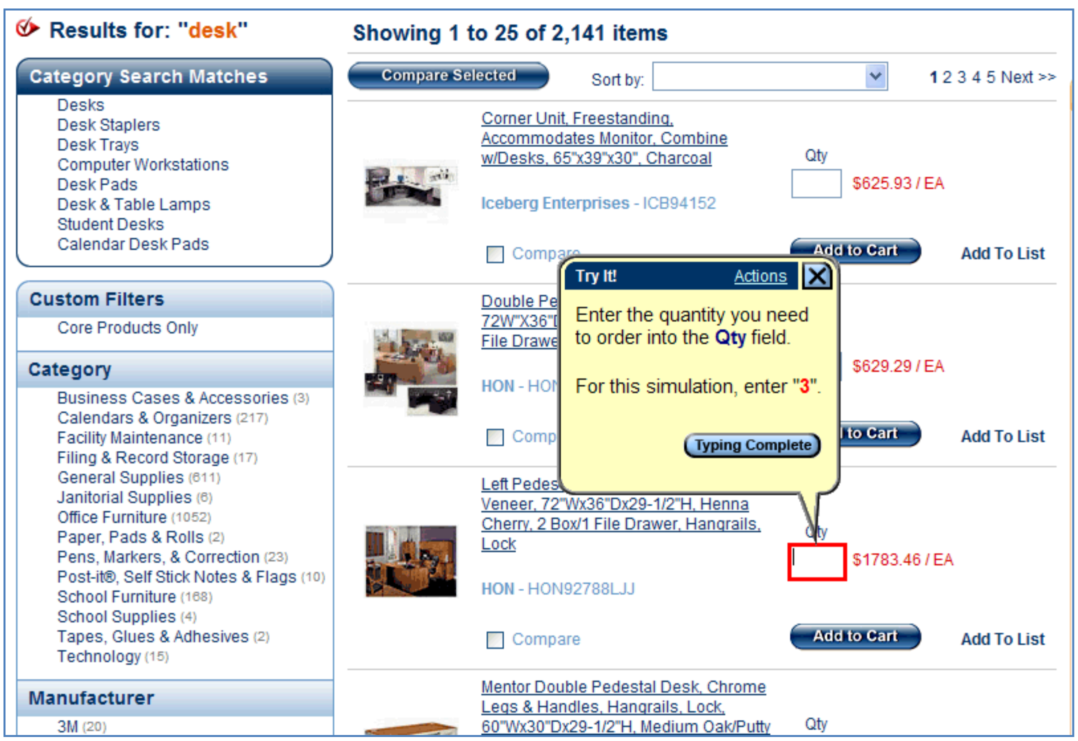


Figure 36 Staples Advantage - Item Search Page

Participant Notes:

Fields	Description
Qty	Use this field to enter the quantity of the item you wish to purchase
Add to Cart	Use this button to select the item(s) for purchase
Go To Cart	Use this button to reivew your slelected items and to finalize your Requisition

Table 25. Staples Advantage - Items Search Page Elements

Staples - Cart Page

Use this page to verify your item(s), quantity, and price and select your delivery service.

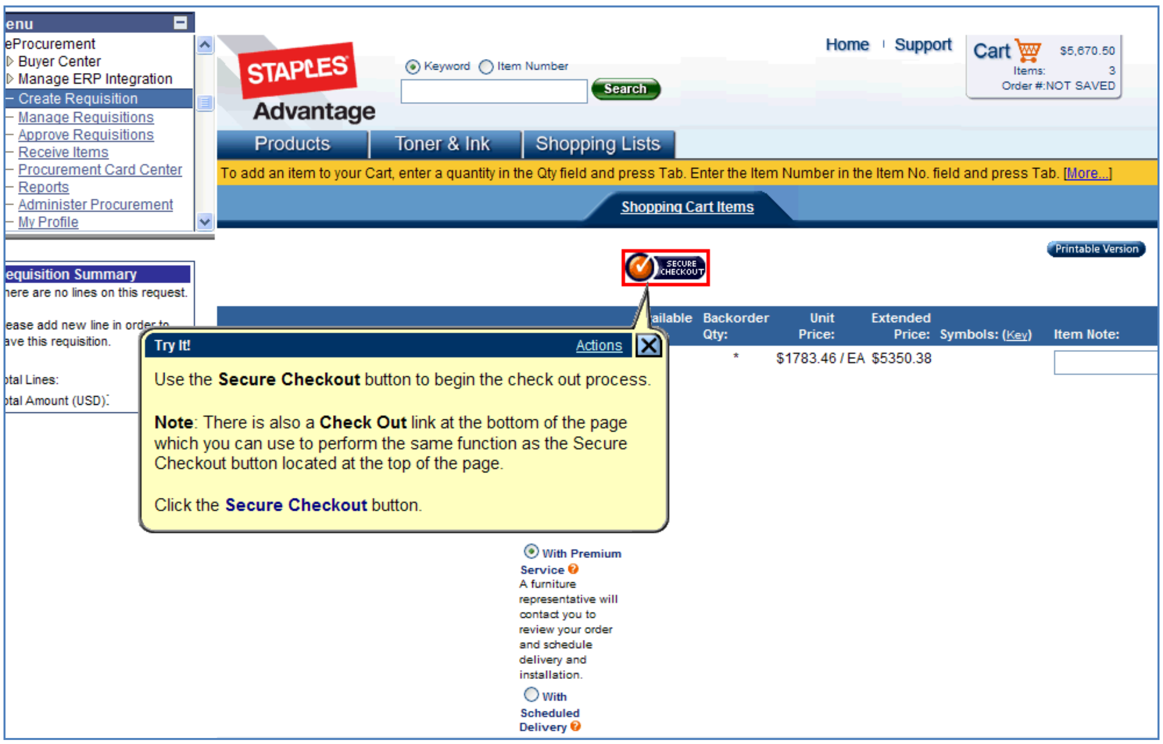


Figure 37. Staples Advantage - Cart Page

Participant Notes:

Fields	Description
Delivery Service	Use these radio buttons to select between Premium Service or Scheduled delivery if available
Secure Checkout	Use this button to begin the checkout process. **Note**: There is also a **Check Out** link at the bottom of the page, which you can use to perform the same function as the Secure Checkout button located at the top of the page.

Table 26. Staples Advantage - Cart Page Elements

Staples - Confirm Order Page

Use the Confirm Order page to review the items before clicking the **Confirm Order** button. Once you have reviewed all items on the Confirm Order page, click the Confirm Order button. Clicking the Confirm Order button transfers the item information from the vendor catalog to the purchase requisition in SMART, and returns you to the purchase requisition in SMART.

Note: **Estimated Tax** will appear on the Confirm Order page. The Estimated Tax amount will NOT transfer to the requisition in SMART.

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

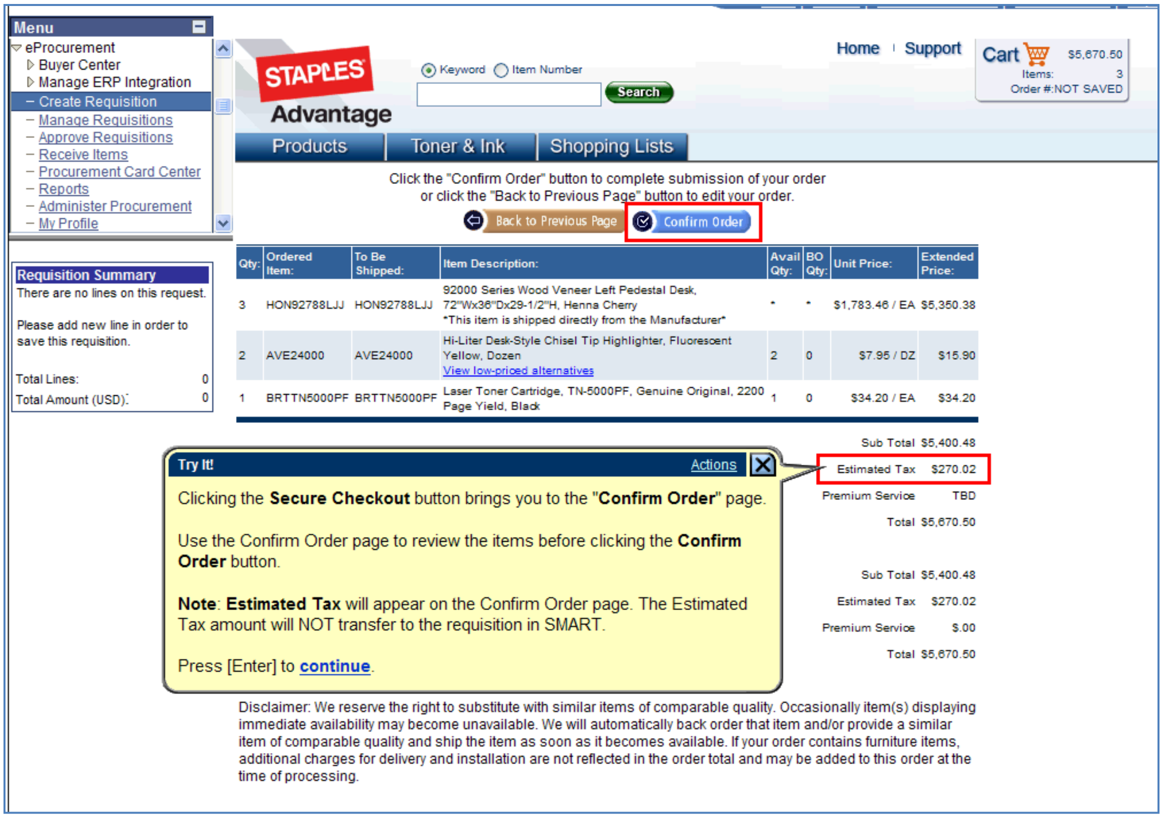


Figure 38. Confirm Order Page

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

Editing a Web Catalog Purchase Requisition – Quantity

Quantities cannot be changed after pulling items into a requisition from a vendor's website. To edit quantities on a web catalog requisition, you have two options:
1) Delete the requisition and start over, or
2) Delete the line, go back to the vendor's website using the "Add Items and Services" page, re-enter the item and correct quantity.

Editing a Web Catalog Purchase Requisition – Shipping Address

Staples do not ship items based on the purchase requisition Ship To information, they ship items based on the purchase order Ship To information. The interface built between the State of Kansas and Staples is set up to communicate twice: First we access item information from the Staples Advantage web catalog, which populates into the purchase requisition in SMART.

Second, once the purchase requisition has been through the approval workflow process and the Auto Sourcing process successfully (to create the purchase order), the purchase order is then transmitted electronically through the interface to Staples.

If you manually modify a Shipping (Ship To) address while creating a purchase requisition in SMART, the State of Kansas best practice recommends that you include a name for the new shipping location in the "Address 1" field.

For example: In this example, you are a Requisitioner for the Department of Transportation who is shipping something to the Hyatt Place hotel. When entering the purchase requisition in SMART, you need to modify the shipping address information by entering the hotel name (you are shipping to) in the Address 1 line, and then enter the actual street address information in the Address 2 line.

Participant Notes:

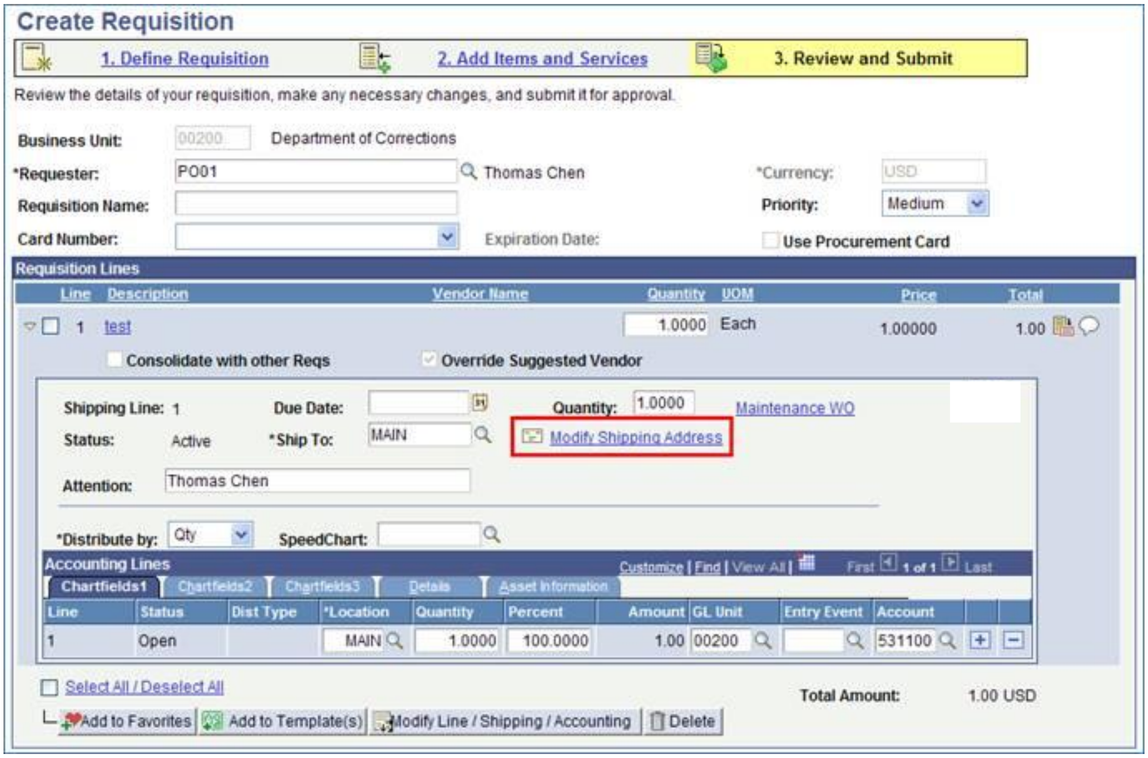


Figure 39. 3. Review and Submit page – Modify Shipping Address Link

Rest of this page left intentionally blank. Please turn to the next page.

Participant Notes:

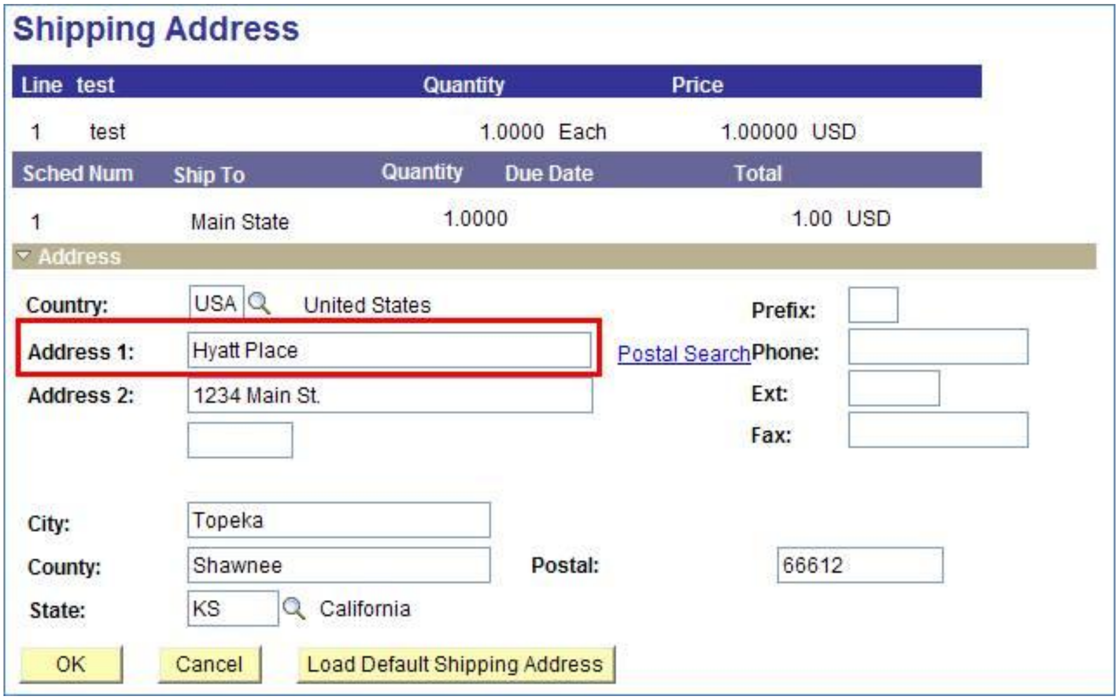


Figure 40. Shipping Address Page – Modified Shipping Address 1 field

If you do not enter the hotel name in the Address 1 line, the shipping address on the purchase requisition (and the purchase order) might look something like this:

Department of Transportation (Staples will always put the location code name first in the shipping address, regardless of whether the remaining address information has changed),1234 Main St., Topeka, KS 66612

Instead of the correct address which should appear as: Department of Transportation, Hyatt Place, 1234 Main St., Topeka KS 66612.

Participant Notes:

Topic 7: Editing, Saving, and Submitting Requisitions

You may need to edit a requisition after it is created by adding line comments, changing item quantities, and changing the distribution of items among departments. You can edit a requisition before finalizing and submitting for approval.

- Several screens used to modify requisitions are accessed via the Review and Submit requisitions page
- Editing requisitions can take place before or after saving

Manage Requisitions Page

Use the **Manage Requisitions page** to view a list of requisitions in various statuses, after they have been saved. From this page, you can access other pages to review requisition details and edit or cancel requisitions.

Walkthrough/Activity

We will now complete a walkthrough using a UPK simulation: Editing, Saving, and Submitting Requisitions.

Walkthrough/Activity

We will now complete Activity 11: Editing, Saving, and Submitting Requisitions in your Activity Guide

Page Name	Navigation
Manage Requisitions	eProcurement > Manage Requisitions

Participant Notes:

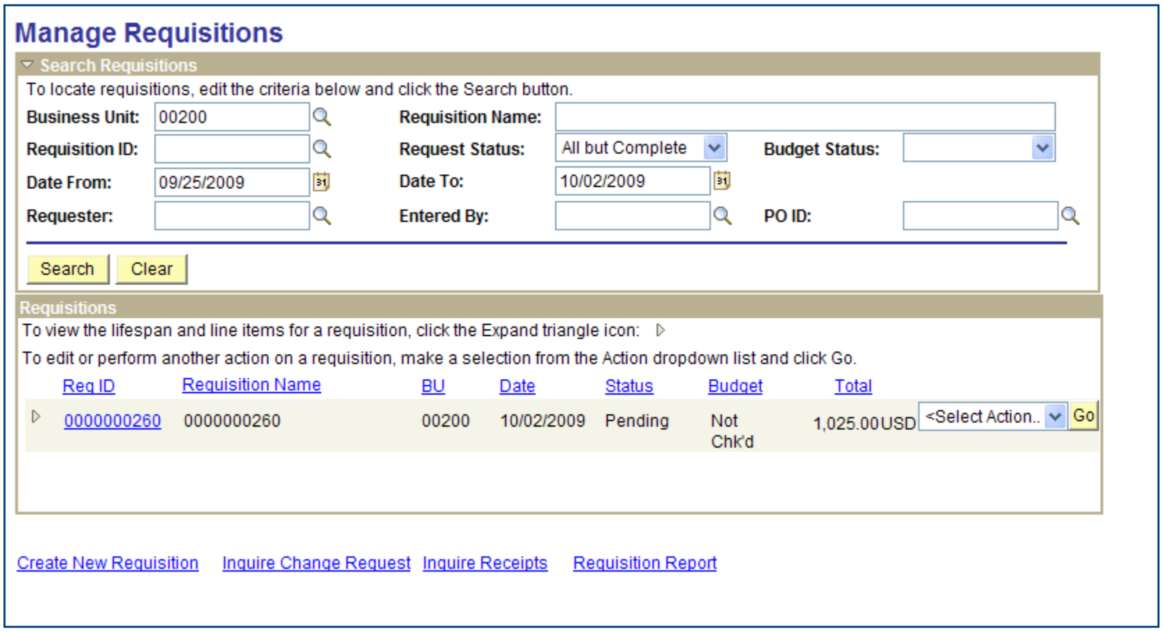


Figure 41. Manage Requisitions Page

Fields	Description
Request Status	Use this dropdown to select from the follwing Requisition Statuses: *All But Complete, Approved, Cancelled, Denied, Open, PO(s) Created, PO(s) Dispatched, Pending, Received, Service Complete, Service Filled, or Service Sourced*
Budget Status	Use this dropdown to select one of the following budget statuses for the Requisition: *Error*, *Not Chk'd*, or *Valid*
Entered By	Use this field to search for the person that created the requisition

Participant Notes:

Fields	Description
PO ID	Use this field to enter the PO ID (purchase order number)
Select Action Dropdown	Use this dropdown to select from the following action for requisition management: *Cancel Requisition, Copy Requisition, Edit Requisition, or Budget Check*
Create New Requisition	Click this link to create a new requisition.
Inquire Change Request	The State of Kansas is not using this functionality. Please do not use this link.
Inquire Receipts	Click this link to access the **Receipts For** page where you can view and maintain receipts
Requisition Report	The State of Kansas is not using this functionality. Please do not use this link.

Table 27. Manage Requisitions Page Elements

Lesson Review

In this lesson, you learned how to:

- Navigate within SMART to create purchase requisitions
- Locate and use items on the items master list for a purchase requisition
- Enter asset information and project information on a purchase requisition
- Use a Prior Authorization Request to create a purchase requisition
- Edit, save, and submit purchase requisitions

Participant Notes:

Lesson 4: Managing Purchase Requisitions

Objectives

Upon completion of this lesson, you will be able to:

- View and understand purchase requisition statuses
- Manage purchase requisitions

Key Terms

Topic 1: Purchase Requisition Status

- **Approved**: The requisition is approved and can become a purchase order.
- **Canceled**: The requisition was entered and saved but was canceled. A canceled requisition can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently.
- **Complete**: After the requisition is dispatched on a purchase order, the goods are received and the vendor is paid. A background process identifies the requisition status as Complete. Canceled requisitions are also identified as Complete.
- **Denied**: The requisition is denied in the approval process.
- **Open**: The requisition has been entered and saved but not yet submitted, or the receipt has been entered and saved but might have errors.
- **PO(s) Created**: The requisition has been placed on a purchase order.

Participant Notes:

- **PO(s) Dispatched**: The requisition has been placed on a purchase order, and the purchase order has been dispatched to the vendor.
- **Pending**: The requisition has been submitted and is awaiting approval.
- **Received**: The requisition has been placed on a purchase order. The purchase order has been dispatched to the vendor, and the goods have been partially or fully received.

Topic 2: Manage Purchase Requisitions

- The SMART Manage Requisition feature provides you with the ability to review, edit, approve, or cancel requisitions. After the requisition is auto sourced to a purchase order, the goods are received and the vendor is paid. The requisition status will changed to "Complete". Canceled requisitions are also identified as "Complete".

Manage Requisitions - Requisitions Section Expanded

Click the **Expand Section** button to view the life span and line items for a requisition. Stages in the requisition cycle that are complete or in progress are highlighted with active links. You can click any link to view the detail of a stage.

Page Name	Navigation
Requisitions Section Expanded	eProcurement > Manage Requisitions > Expand Section (Requisition)

Participant Notes:

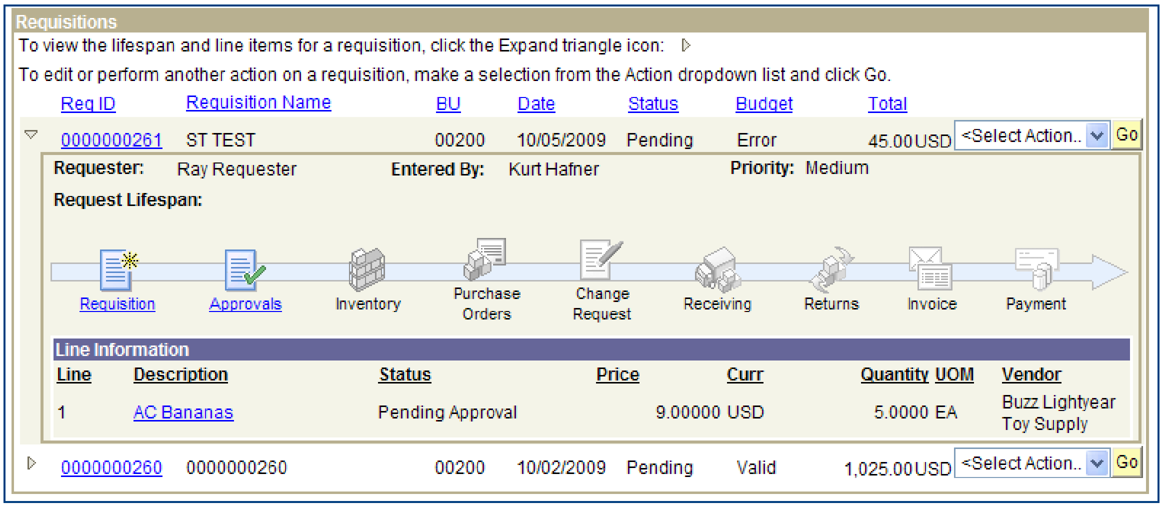


Figure 42. Requisitions Section Expanded

Requisition Details Page

Use this page to view details about individual requisitions. The **PO Information** header bar appears only if a purchase order was created for the requisition.

Page Name	Navigation
Requisitions Details	eProcurement > Manage Requisitions > Requisition ID Link

Participant Notes:

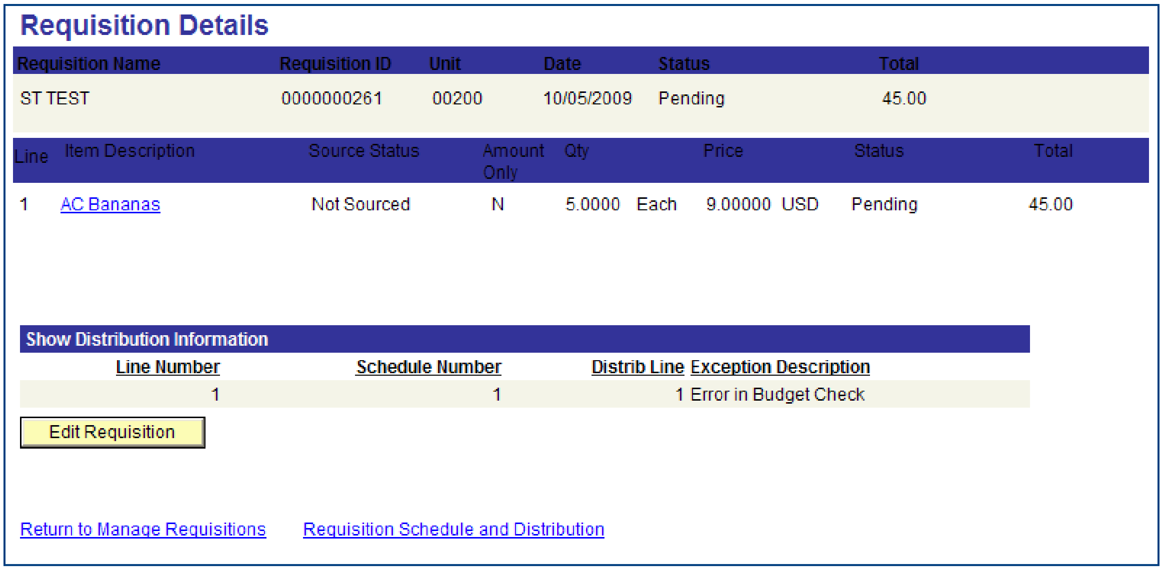


Figure 43. Requisition Details Page

Fields	**Description**
Item Description	Use this link to view an item's description. You can also access the item's detail document.
Source Status	Use this field to view the stage of the requisition line in the sourcing process. Values include: **Not Sourced**, the requisition line has not been sourced; **Available**, the requisition line has not yet been placed on a PO; **In Process**, a sourcing process is running on this requisition line, or there is an error in creating a PO; **Sourcing Complete**, the requisition line has been sourced to a PO

Table 28. Requisition Details Page Elements

Participant Notes:

Requisition Schedule and Distribution Page

Use this page to view line details, schedules, and distribution information.

Page Name	Navigation
Requisitions Schedule and Distribution	eProcurement > Manage Requisitions > Requisition ID Link > Requisition Detail Page > Requisitions Schedule and Distribution Link

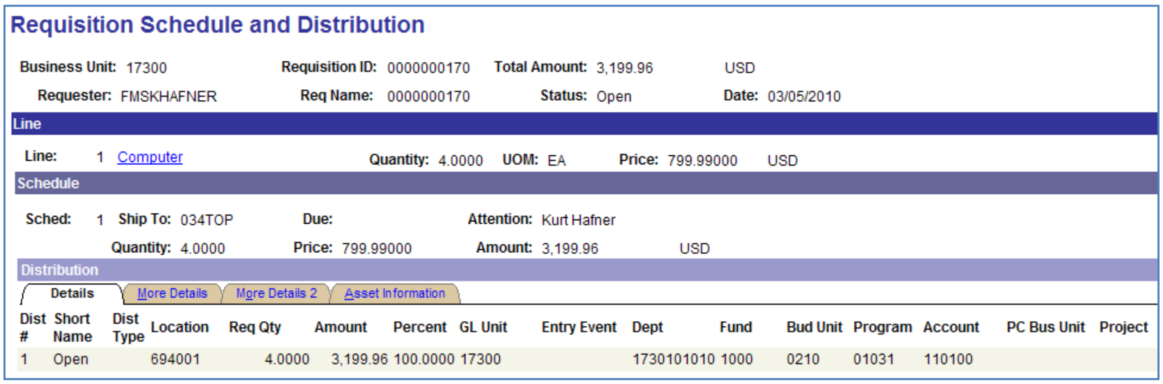


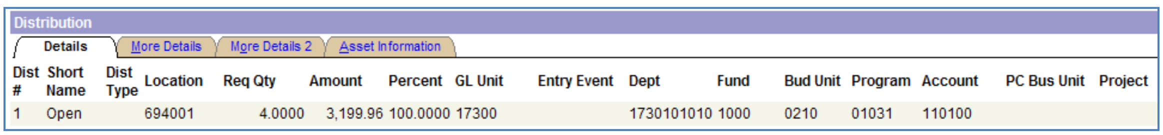
Figure 44. Requisition Schedule Distribution Page

Fields	Description
Line Section	This section contains all lines on a requisition. To view the item's description, click the item name.
Schedule	This section displays shipping information for the item, such as where the Ship To location, Due Date, price per item, and total amount.
Distribution Section	This section displays the ChartField (distribution) information for the item

Participant Notes:

Fields	Description
Dist #	This section displays the number the system assigns to this distribution. SMART uses this numbering to distinguish between multiple distributions for a single requisition line.
Distribution Type	This displays the method by which the system allocates or charges an expense account distribution. Values include: **Amt**, the sum of all distribution amounts must equal the schedule amount (merchandise amount); **Qty**, the sum of all distribution quantities must equal the schedule quantity.

Table 29. Requisition Schedule Distribution Page Elements



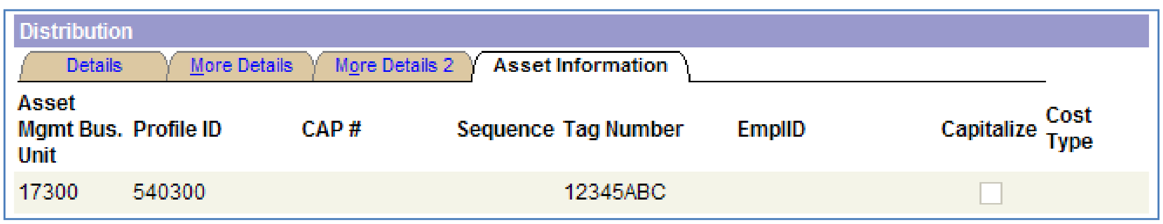
Distribution

Details | More Details | More Details 2 | Asset Information

Dist #	Short Name	Dist Type	Location	Req Qty	Amount	Percent	GL Unit	Entry Event	Dept	Fund	Bud Unit	Program	Account	PC Bus Unit	Project
1	Open		694001	4.0000	3,199.96	100.0000	17300		1730101010	1000	0210	01031	110100		

Figure 45. Requisition Schedule Distribution Page_Details Tab

Note: The State of Kansas is not using the More Details or the More Details 2 tabs



Distribution

Details | More Details | More Details 2 | Asset Information

Asset Mgmt Bus. Unit	Profile ID	CAP #	Sequence	Tag Number	EmplID	Capitalize	Cost Type
17300	540300			12345ABC			

Figure 46. Requisition Schedule Distribution Page_Asset Information Tab

Participant Notes:

Walkthrough/Activity

We will now complete a walkthrough using a UPK simulation: Managing Requisitions.

Lesson Review

In this lesson, you learned:

- Purchase requisition statuses and the definition of each status
- How to navigate in SMART to locate purchase requisition information
- The processes associated with managing purchase requisitions in SMART

Walkthrough/Activity

You will now complete Activity 12: Using the Manage Requisitions Page in SMART.

Rest of this page left intentionally blank. *Please turn to the next page.*

Participant Notes:

Lesson 5: Item Selection Methods

Objectives

Upon completion of this lesson, you will be able to:

- Locate, select and save favorite items
- Create and use personal templates
- Create, edit and cancel special requests for goods
- Create, edit and cancel special requests for services

Topic 1: Favorite Items

- Favorites are frequently ordered items that you can maintain in a single location. You can create a list of frequently ordered (favorite) items and use the list to add items to a requisition without searching the item catalog.
- The list of favorite items that you create is based on the Requester's user ID. It is not specific to the Requisitioner's user ID.
- Sharing of favorite items varies across agencies (Business Units).
- If an agency (Business Unit) allows a Requisitioner to create requisitions on behalf of multiple Requesters, that Requisitioner will have access to multiple Favorite Items.
- If an agency (Business Unit) limits a Requisitioner access to only himself/herself as a Requester, then his/her favorite items will not be shared (the Requisitioner's favorite items will not be able to be used by any other Requisitioners).
- Adding items to favorites can be done on several pages when creating a requisition

Participant Notes:

2. Add Items and Services - Favorites Tab

When you select and add an item to Favorites, SMART provides a **Confirmation message** prompt in a new window. Click the Close button to close the Confirmation message window.

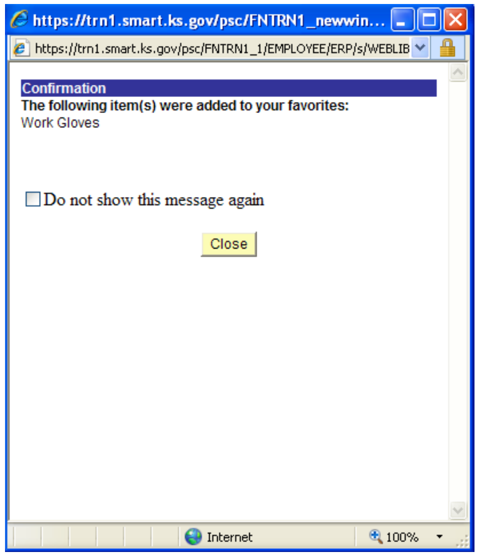


Figure 47. 2. Add Favorite Items Confirmation Message

Use the Favorites tab page to view and select items you have designated as favorites.

Page Name	Navigation
Favorites Tab	eProcurement > Add Items and Services > Favorites Tab

Participant Notes:

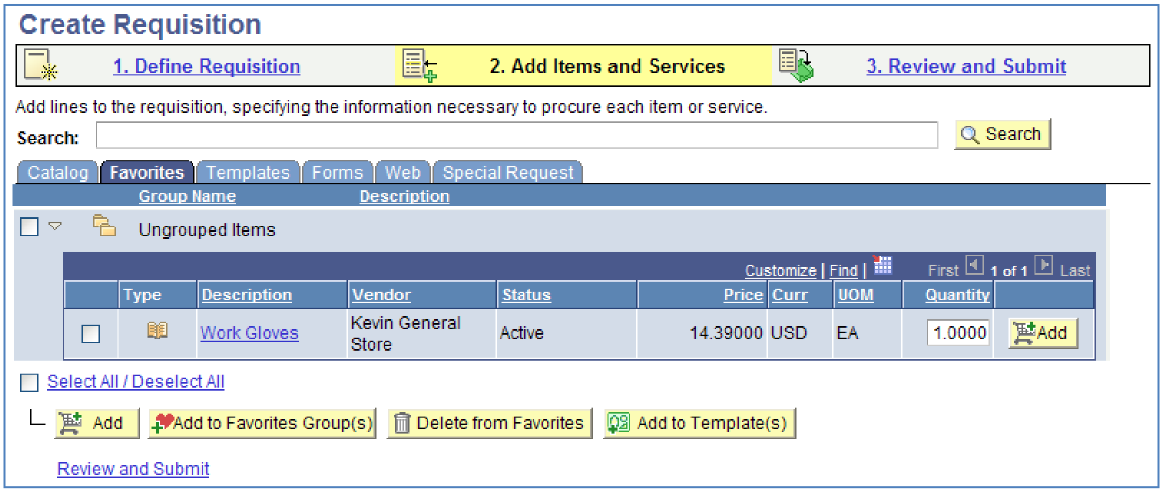


Figure 48. 2. Add Items and Services_Favorites Tab

Walkthrough/Activity

We will now complete Activity 13: Favorite Items, and Activity 14: Using a Favorite Item in your Activity Guide.

Participant Notes:

Topic 2: Personal Templates

- Personal Templates are a way to group items that are often ordered together. Personal templates enable you to quickly create requisitions for frequently ordered items.
- Personal templates are based on the Requester's user ID. They are not user specific to the Requisitioner's user ID.
- Sharing of personal templates varies across agencies (Business Units)
- If an agency (Business Unit) allows a Requisitioner to create requisitions on behalf of multiple Requesters, that Requisitioner will have access to multiple personal templates.
- If an agency (Business Unit) limits a Requisitioner access to only himself/herself as a Requester, then his/her personal templates will not be shared (the Requisitioner's personal templates will not be able to be used by any other Requisitioners).
- When using an existing personal template: Click the **Expand Section button** to view the items and quantities contained within the template. The **Quantity** field designates the number of *templates* you want to order (*not* the total number of items you want to order). For example: If your template contains 3 chairs, and you enter a quantity of '3' into the Quantity field, a total of 9 items will appear on the 3. Review and Submit page. (3 chairs x 3 templates = total of 9 items)
- To use an existing personal template, click the **Expand section button** for the desired template, enter the quantity into the **Quantity** field, and then click the **Add button**. Clicking the Add button adds the items to the 3. Review and Submit page.

Participant Notes:

Add Selected Items to Template(s) Page

Use this page to create a personal template.

Page Name	Navigation
Add Selected Items to Template(s) Page	eProcurement > 3. Review and Submit > Select the Line selection Checkbox(es) > Click the Add to Template(s) button

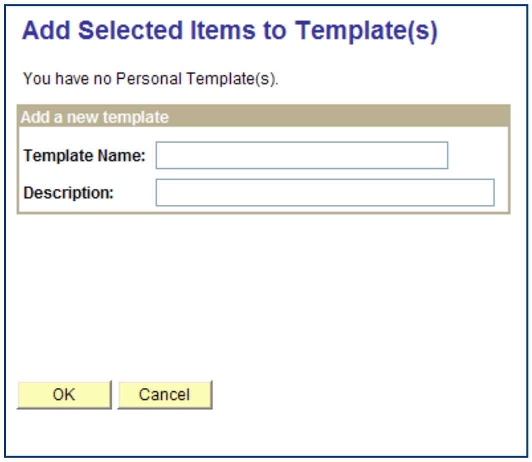


Figure 49. Add Selected Items to Template(s) Page

Participant Notes:

Page Name	Navigation
Templates	Add Items or Services > Templates > Expand Section button

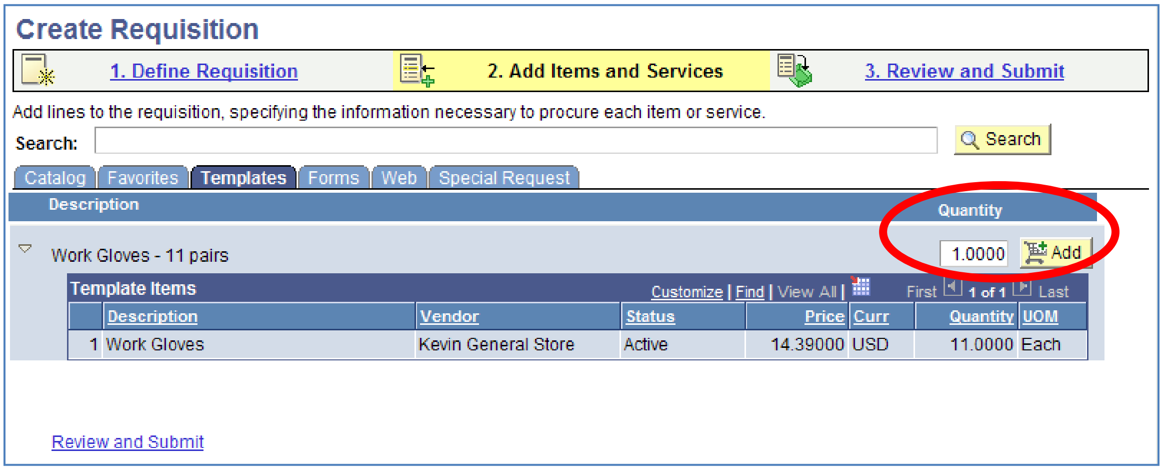


Figure 50. 2. Add Items and Services_Templates Tab_Use Existing Personal Template

Walkthrough/Activity

We will now complete Activity 15: Personal Templates, and Activity 16: Using a Personal Template in your Activity Guide.

Participant Notes:

Topic 3: Special Request for Services

- **Special request for services**: You can create a special request for services in SMART. Services include tasks that are performed by outside agents. For example, package delivery, temporary help, or repair work.

Special Request - Variable Cost Service Page

Use this page to service that is based on the number of hours of work.

Page Name	Navigation
Variable Cost Service Page	Add Items or Services > Special Request > Variable Cost Service Link

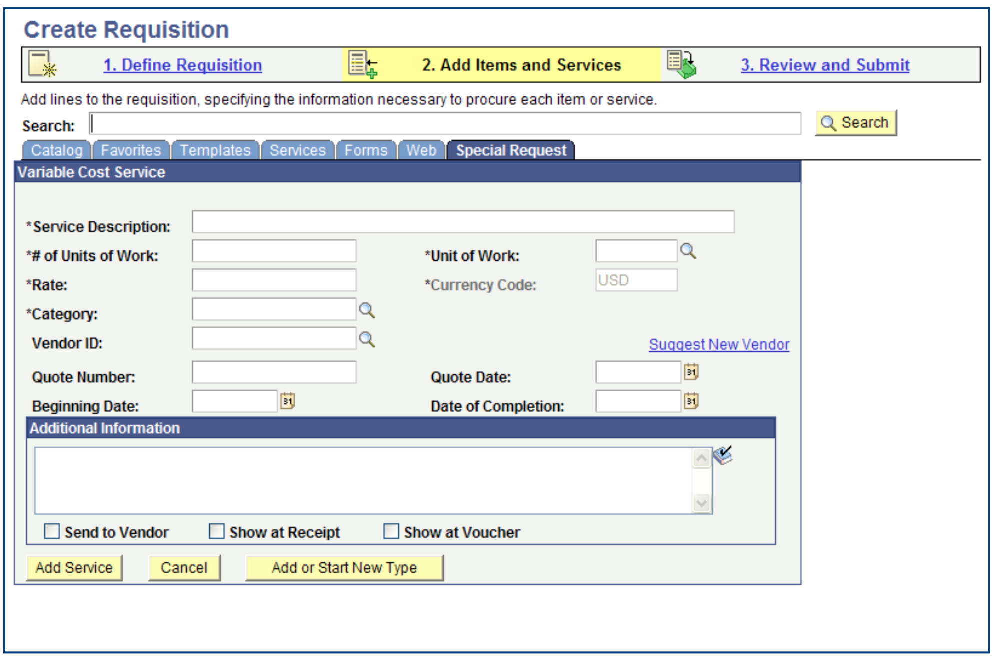


Figure 51. Variable Cost Service Page

Participant Notes:

Fields	Description
Service Description	Use this field to specify details about the service that you are requesting.
# of Units of Work	Use this field to enter the time that is needed to complete the service, based on the unit of work. For example, 2 hours or 6 days.
Unit of Work	Use this field to enter the number of measured time-based units of work needed for the service.
Rate	Use this field to specify the unit price for this service, based on the unit of work.
Category	*When creating a Special Request in SMART, you MUST populate a* ***Category*** *code.* Use the **Category** field to enter the Category code number for the item(s) you are requisitioning. **Note**: Category codes are mapped to Account Chartfield codes in SMART. If you do not know the Category code, click the LookUp button to view and select from a list of available options.
Vendor ID	*When creating a Special Request in SMART, you need to populate a* ***Vendor ID****.* If you do not know the Vendor ID number, click the LookUp button to view and select from a list of available options. **Note**: Vendor ID's are maintained by Central. If you cannot locate the Vendor ID, please add the Vendor information to the Additional Information text field and leave the Vendor ID field empty (blank).
Quote Number	Use this field to enter the quote number given to you by the Vendor
Beginning Date	Use this field to enter the beginning date of service

Participant Notes:

Fields	Description
Date of Completion	Use this field to enter the ending date of service
Additional Comments	Use this field to enter any additional comments for the special request

Table 30. Variable Cost Service Page Elements

Special Request - Fixed Cost Service Page

Use this page to request a fixed-cost service. This is a service with a fixed fee and is not part of the standard item catalog.

Page Name	Navigation
Fixed Cost Service Expanded	Add Items and Services > Special Request Tab > Fixed Cost Service Link

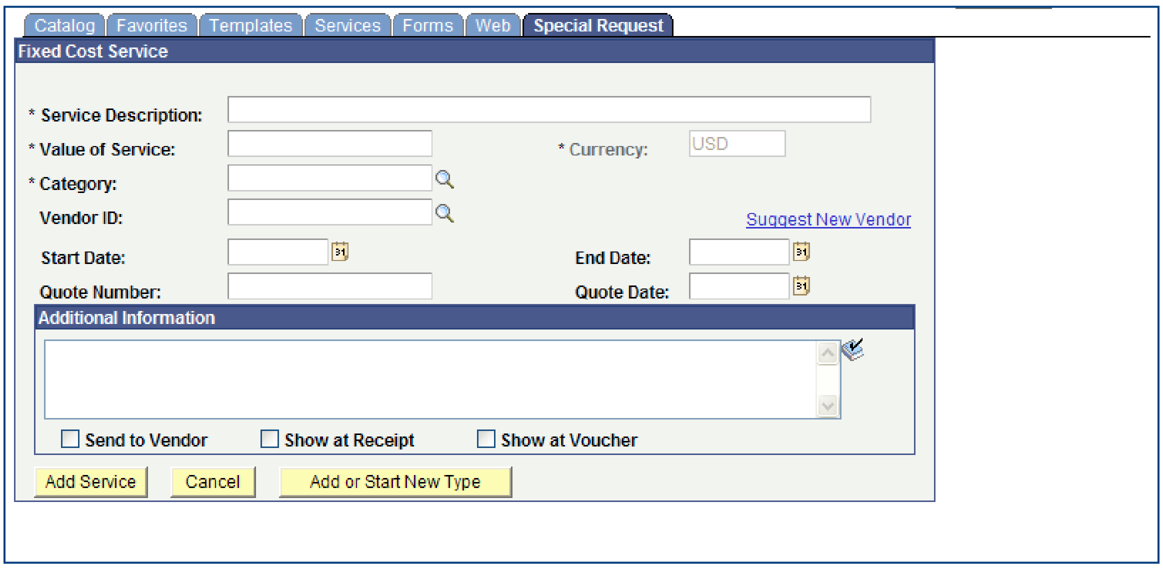


Figure 52. Fixed Cost Service Expanded Page

Participant Notes:

Fields	Description
Value of Service	Use this field to enter the cost of this service. This amount is saved on the requisition line with the quantity *1* and the unit of measure *Each.*
Category	*When creating a Special Request in SMART, you MUST populate a **Category** code.* Use the **Category** field to enter the Category code number for the item(s) you are requisitioning. **Note**: Category codes are mapped to Account Chartfield codes in SMART. If you do not know the Category code, click the LookUp button to view and select from a list of available options.
Vendor ID	*When creating a Special Request in SMART, you need to populate a **Vendor ID**.* If you do not know the Vendor ID number, click the LookUp button to view and select from a list of available options. **Note**: Vendor ID's are maintained by Central. If you cannot locate the Vendor ID, please add the Vendor information to the Additional Information text field and leave the Vendor ID field empty (blank).

Table 31. Fixed Cost Service Page Elements

Walkthrough/Activity

You will now complete Activity 17: Create a Special Request for a Fixed Cost Service in your Activity Guide.

Participant Notes:

Lesson Review

In this lesson, you learned:

- How to locate, select and save favorite items in SMART
- Create personal templates, and create requisitions using personal templates
- How to create, edit and cancel special requests for services

Walkthrough/Activity

You will now complete Activity 18: Processing Purchase Requisitions in SMART in your Activity Guide.

Rest of this page left intentionally blank.

Participant Notes: